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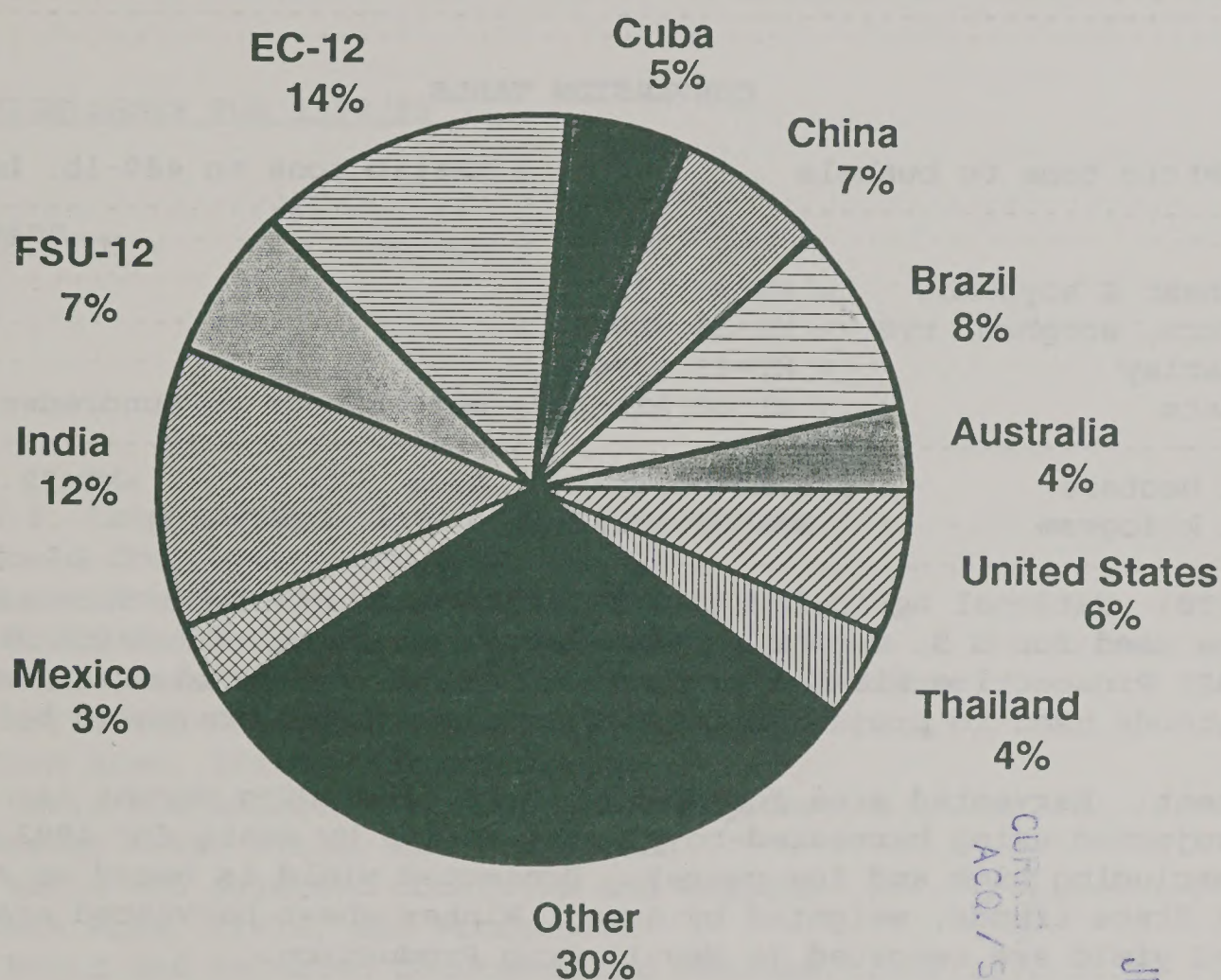
Foreign
Agricultural
Service

Circular Series
WAP 5-93
May 1993

World Agricultural Production

World Centrifugal Sugar Production

Top Producers



Production Articles This Month...

World Sugar

World Cotton

Dried Fruit

Pakistan Wheat Overview

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This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. This report is based on unrounded data; numbers may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-278), May 11, 1993.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * Eastern time on June 11, 1993. *

:			:
:	CONVERSION TABLE		:
:			:
:	Metric tons to bushels	:	Metric tons to 480-lb. bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & soybeans = MT*36.7437	:	
:	Corn, sorghum, rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric tons to hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	

NOTE: National Agricultural Statistics Service (NASS) forecasts are used for U.S. winter wheat. For other crops, the March 31 NASS Prospective Plantings report is used for planted area, and methods used to project harvested area and yield are noted below.

Wheat: Harvested area for spring wheat (including durum) is projected using harvested-to-planted ratios by State for 1983-92 (excluding high and low years). Projected yield is based on 1980-92 State trends, weighted by area. Winter wheat harvested area and yield are reported in May 11 Crop Production.

Corn: Harvested area projected by using the relationship between planted and harvested area for 1990-92. Projected yield is derived from simple linear trend fit over 1960-92 period.

Sorghum and Barley: Harvested area projected by using the relationship between planted and harvested area for 1990-92 and projected yield is derived from a simple linear trend fit over the 1960-92 period.

Oats: Harvested area reported in March 31 Prospective Plantings; projected yield is a simple average for 1983-92.

Rice: Harvested area reported using harvested-to-planted ratios for 1990-92. Projected yield is derived from a simple linear trend fit for 1963-92

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PRODUCTION HIGHLIGHTS FOR 1993/94

May 1993

WHEAT: World production for 1993/94 is projected at 548.8 million tons, down 8.8 million or 2 percent from the 1992/93 harvest. Total foreign production is projected at 480.5 million tons, down 10.1 million or 2 percent from 1992/93. Country highlights are as follows:

- o **United States** Production is forecast at 68.2 million tons, up 1.3 million or 2 percent from 1992/93. Harvested area is forecast higher.
- o **FSU-12** Production is forecast at 77.3 million tons, down 10.6 million or 12 percent from 1992/93. Cool, wet weather last fall negatively affected winter crop sowings in Ukraine and Russia. Harvested area is projected to fall 1.8 million hectares, to 43.5 million.
- o **China** Production is forecast at 96.0 million tons, down 5.0 million or 5 percent from 1992/93. Area is forecast slightly lower since producers are expected to switch to cash crops.
- o **EC-12** Production is forecast at 82.1 million tons, down 2.5 million or 3 percent from 1992/93. Area is forecast lower in part due to CAP reform. Spain is suffering again from a drought and production prospects are unfavorable. Yield prospects across the rest of the EC are generally favorable.
- o **Canada** Production is forecast at 28.0 million tons, down 1.9 million or 6 percent from 1992/93. Planting intentions indicate that producers will plant less wheat this season, according to Statistics Canada.
- o **Other N. Africa** Production is forecast at 4.6 million tons, down 0.5 million or 9 percent from 1992/93. Tunisia's output is forecast below last year's level, but above the 5-year average. In Morocco and Algeria, production is projected lower due to drought.
- o **Brazil** Production is forecast at 2.5 million tons, down 0.3 million or 11 percent from 1992/93. Harvested area is forecast to decline from 1992/93 as low producer prices are expected to pressure Brazilian farmers to plant less.
- o **Pakistan** Production is forecast at 15.5 million tons, down 0.2 million or 1 percent from 1992/93. Abnormally high temperatures during late-January and early-February stressed developing crops and reduced yield potential.
- o **India** Production is forecast at 55.0 million tons, down 0.1 million or less than 1 percent from 1992/93. While estimated area expanded slightly, high temperatures in February and heavy rains in late-March reduced yield prospects.
- o **Eastern Europe** Production is forecast 32.5 million tons, up 5.9 million or 22 percent from 1992/93. Area and yield are forecast to rebound from last season's drought. The crops are generally in good condition, but shortages of agricultural inputs, caused by economic constraints, hinder yield prospects.

- o **Argentina** Production is forecast at 10.5 million tons, up 1.3 million or 14 percent from 1992/93. Area is forecast to bounce back from last year's reduced level.
- o **Australia** Production is forecast at 16.0 million tons, up 0.6 million or 4 percent from 1992/93. Harvested area is forecast to increase 1.4 million hectares from last year as low wool prices and a further reduction in sheep numbers in the wheat-sheep zone are expected to make additional pasture-land available for wheat production.
- o **Turkey** Production is forecast at 16.2 million tons, up 0.5 million or 3 percent from 1992/93. Good winter and spring precipitation improved yield potential.

COARSE GRAINS: World production for 1993/94 is forecast at 816.7 million tons, down 37.5 million or 4 percent from the 1992/93 harvest. Total foreign production is projected at 571.4 million tons, down 5.0 million or 1 percent from 1992/93. Country highlights are as follows:

- o **United States** Production is forecast at 245.3 million tons, down 32.5 million or 12 percent from 1992/93. All coarse grains area and production are forecast to decline from last year.
- o **India** Production is forecast at 31.2 million tons, down 5.6 million or 15 percent from 1992/93. Corn, barley, and millet output are forecast to decline from last season's bumper crop.
- o **EC-12** Production is forecast at 77.1 million tons, down 4.9 million or 6 percent from 1992/93. Corn output in France is forecast to decline 2.1 million tons from last year's record level. In Spain, the growing season is experiencing a drought that is forecast to reduce harvested area and yield prospects.
- o **China** Production is forecast at 106.0 million tons, down 3.6 million or 3 percent from 1992/93. Corn harvested area is forecast to decline from 1992/93 as farmers switch to more profitable crops. Yield is forecast slightly above the 5-year average.
- o **FSU-12** Production is forecast at 90.5 million tons, down 1.8 million or 2 percent from 1992/93. Spring crop sowings are late, due mainly to cool, wet weather. Also, reports of shortages of fertilizer, plant protectants, and fuel have contributed to the forecast lower output.
- o **Brazil** Production is forecast at 27.8 million tons, down 1.0 million or 3 percent from 1992/93. Corn harvested area is forecast to remain unchanged, while yield is projected to be lower than the 1992/93 record level.
- o **South Africa** Production is forecast at 8.6 million tons, down 0.5 million or 6 percent from 1992/93. Corn harvested area and yield are forecast to return to a "more normal" level.
- o **Eastern Europe** Production is forecast at 51.2 million tons, up 7.0 million or 16 percent from 1992/93. Production is forecast to rebound from last year's poor, drought-reduced crop. The weather across most of the region has been favorable.
- o **Canada** Production is forecast at 21.9 million tons, up 2.4 million or 12 percent from 1992/93. A recent Statistics Canada report indicated higher area than last year for corn, barley, and oats.

o Turkey

Production is forecast at 9.5 million tons, up 0.5 million or 5 percent from 1992/93. Barley yield and corn harvested area are forecast higher.

RICE (MILLED-BASIS): World production for 1993/94 is projected at 347.5 million tons, down 3.3 million or 1 percent from the 1992/93 crop. U.S. output is projected at 5.5 million tons, down 0.2 million or 4 percent from 1992/93. U.S. harvested area is forecast at 1.24 million hectares, down 30,000 or 2 percent from 1992/93. (Harvested area reported using harvest-to-planted ratio for 1990-92. Projected yield is derived from simple linear trend fit for 1963-92.) Total foreign production is projected at 342.0 million tons, down 3.1 million or 1 percent from 1992/93.

OILSEEDS: World production for 1993/94 is forecast at a record 228.3 million tons, up 1.5 million or less than 1 percent from 1992/93. Foreign production for 1993/94 is forecast at a record 163.2 million tons, up 5.2 million or 3 percent from last year. Total oilseed production in the United States is forecast at 65.1 million tons, down 3.7 million or 5 percent from 1992/93. (See U.S. Oilseeds Production Brief in this circular for commodity breakout.)

COTTON: World production for 1993/94 is forecast at 87.5 million bales, up 5.0 million or 6 percent from 1992/93. Total foreign production is forecast at 70.0 million bales, up 3.7 million or 6 percent above 1992/93. U.S. production is forecast at 17.5 million bales, up 8 percent from last year.

PRODUCTION HIGHLIGHTS FOR 1992/93

WHEAT: World production for 1992/93 is estimated at 557.5 million tons, down 0.8 million or less than 1 percent from last month's estimate. A downward revision in the FSU-12 estimated output more than offset an increase in Hungary's estimated production.

COARSE GRAINS: World production for 1992/93 is estimated at 854.2 million tons, up 5.8 million tons or 1 percent from last month's estimate. Estimated corn production in Canada, France, and Brazil is revised higher. For the FSU-12, an increase in barley, rye, and oats output is partially offset by a decrease in corn. India's corn, millet, and sorghum production is estimated higher.

RICE (MILLED-BASIS): World production for 1992/93 is projected at 350.8 million tons, down 1.0 million or less than 1 percent from last month, but up 1 percent from 1991/92. India's production is revised lower.

OILSEEDS: World production for 1992/93 is forecast at 226.8 million tons, down marginally from last month, but up 1 percent from 1991/92. Foreign production for 1992/93 is forecast at 158.0 million tons, up marginally from last month, but down 1 percent from 1991/92. Total oilseed production in the United States is forecast at 68.8 million tons, up marginally from April and up 7 percent from 1991/92.

* **Soybeans:** World production for 1992/93 is forecast at a record 116.7 million tons, up 0.8 million or 1 percent from April and up 9 percent from 1991/92. Total foreign production is forecast at a record 56.9 million tons, up 0.8 million or 1 percent from last month and up 8 percent from 1991/92. Country highlights are as follows:

o United States

Production is forecast at 59.8 million tons, unchanged from last month, but up 11 percent from 1991/92. Yield is forecast to be a record. Several important producing states have reported excellent yields.

o Brazil

Production is forecast at 21.8 million tons, up 0.5 million or 2 percent from April and up 14 percent from 1991/92. Harvest is about 85 percent complete and estimated yield is very favorable. Soybeans endured mid-season dry conditions without apparent losses and subsequent good weather improved yields.

- o India Production is forecast at 3.1 million tons, up 0.2 million or 5 percent from April and up 37 percent from 1991/92. Official Indian Government estimates were revised upward due to increased harvested area, especially in Madhya Pradesh and Maharashtra. Slightly better yields also were reported in these major growing regions.
- o Mexico Production is forecast at 0.6 million tons, up 0.2 million or 45 percent from April, but down 20 percent from last season. Wheat area losses due to flooding early in the season resulted in increased soybean area. Also, soybean yields improved under irrigation normally reserved for wheat.
- * **Cottonseed:** World production for 1992/93 is forecast at 31.7 million tons, down slightly from last month and down 14 percent from 1991/92. Total foreign production is forecast at 25.9 million tons, down 0.2 million or 1 percent from last month and down 15 percent from 1991/92. Country highlights are as follows:
 - o United States Production is forecast at 5.8 million tons, up 0.1 million or 2 percent from last month, but down 8 percent from 1991/92. A recent NASS cottonseed estimate adjustment was based on harvest and ginning reports.
 - o Brazil Production is forecast at 0.9 million tons, down 0.1 million or 11 percent from last month and down 22 percent from 1991/92. Harvest is over 50 percent complete, with area and yield forecast lower. While the cotton crop is expected to be better in the Center-South than last year, overall cottonseed yield is forecast to be no more than last season due to a reduction in fertilizer usage.
- * **Peanuts:** World production for 1992/93 is forecast at 22.4 million tons, up 0.3 million or 1 percent from last month and up 1 percent from 1991/92. Total foreign production is forecast at 20.4 million tons, up 0.3 million or 1 percent from last month and up 2 percent from 1991/92. Country highlights are as follows:
 - o United States Production is forecast at 2.0 million tons, unchanged from April, but down 13 percent from 1991/92. This season's yield is forecast up slightly from 1991/92, although area is forecast down 17 percent.
 - o India Production is forecast at 8.6 million tons, up 0.3 million or 4 percent from April and up 21 percent from last year. Official estimates increased the summer (kharif) crop due to higher yields, especially in the states of Gujarat, Madhya Pradesh, and Maharashtra. Yields in the southern states were lowered slightly.
- * **Sunflowerseed:** World production for 1992/93 is forecast at 21.4 million tons, down 0.2 million or 1 percent from last month and down slightly from 1991/92. Total foreign production is forecast at 20.2 million tons, down 0.2 million or 1 percent from last month, but up 2 percent from 1991/92. Country highlights are as follows:
 - o United States Production is forecast at 1.2 million tons, unchanged from April, but down 28 percent from last year. Both yield and harvested area are down from 1991/92.
 - o Argentina Production is forecast at 3.4 million tons, down 0.1 million or 3 percent from last month and down 11 percent from 1991/92. Harvested area is forecast down slightly due a mid-April storm. Heavy rain and wind damaged sunflowers ready for harvest.

- * **Rapeseed:** World production for 1992/93 is forecast at 26.2 million tons, down 0.3 million or 1 percent from last month and down 7 percent from last year. Total foreign production is forecast at 26.2 million tons, down 0.3 million or 1 percent from last month and down 7 percent from 1991/92. Country highlights are as follows:
 - o **United States** Production is forecast at 85,000 tons, unchanged from last month, but down 10 percent from 1991/92. Rapeseed yield was slightly better in 1991/92, but harvested area in 1992/93 declined by 11,000 hectares, to 55,000.
 - o **India** Production is forecast at 5.7 million tons down 0.3 million or 6 percent from April and down 3 percent from last season. Official government data indicates that rapeseed area declined, mainly in Uttar Pradesh. A higher wheat price in this region presented farmers with an incentive to shift out of rapeseed this season.
- * **Copra:** World production for 1992/93 is forecast at 4.9 million tons, up 50,000 or 1 percent from last month and up 2 percent from 1991/92. There were no significant country changes this month.
- * **Palm Kernels:** World production for 1992/93 is forecast at a record 3.6 million tons, unchanged from last month, but up 6 percent from 1991/92. There were no significant country changes this month.
- * **Palm Oil:** World production for 1992/93 is forecast at a record 12.4 million tons, up marginally from last month and up 8 percent from 1991/92. There were no significant country changes this month.

COTTON: World production for 1992/93 is projected at 82.5 million bales, down 0.8 million or 1 percent from last month and down 14 percent from the record 1991/92 crop. Total foreign production is projected at 66.3 million bales, down 0.8 million or 1 percent from last month and down 15 percent from the record crop of 1991/92. Country highlights are as follows:

- o **United States** Production is estimated at 16.2 million bales, up slightly from last month, but down 8 percent from 1991/92.
- o **Brazil** Production is estimated at 2.2 million bales, down 0.4 million or 15 percent from last month and down 36 percent from 1991/92. Yield and area were reduced based on continued drought in the Northeast. Lower yields also are estimated for Minas Gerais, Mato Grosso, Mato Grosso do Sol, and Goias.
- o **FSU-12** Production is estimated at 9.4 million bales, down 0.2 million or 2 percent from last month and down 16 percent from 1991/92. Yield was reduced resulting from civil unrest in Tajikistan.
- o **Greece** Production is estimated at 1.1 million bales, down 0.2 million or 13 percent from last month, but up 11 percent from last year. Yield and area were reduced due to substantial field cotton abandonment caused by adverse weather early in the year.
- o **Argentina** Production is estimated at 0.7 million bales, down 0.1 million or 13 percent from last month and down 39 percent from 1991/92. Yield and area were reduced because of poor management practices and weather-related crop damage.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION		
	1991/92	Prel. 1992/93	Proj. 1993/94	1991/92	Prel. 1992/93	Proj. 1993/94	1991/92	Prel. 1992/93	1993/94 Proj. May	1991/92	Prel. 1992/93	1993/94 Proj. May
	---Million acres---			---Million acres---			---Bushels per acre---			---Million bushels---		
All Wheat	69.9	72.3	72.3	57.7	62.4	64.5	34.3	39.4	38.9	1,981	2,459	2,508
Winter	51.1	51.1	51.2	39.4	41.9	44.3	34.8	38.3	40.8	1,373	1,607	1,808
Other	18.8	21.2	21.1	18.3	20.5	20.2	33.2	41.6	34.7	608	852	700
Rye	1.7	1.6	1.5	0.4	0.4	0.4	24.6	29.4	26.2	10	12	10
Soybeans	59.2	59.3	59.3	58.0	58.4	58.2	34.2	37.6	35.1	1,987	2,197	2,045
Corn	76.0	79.3	76.5	68.8	72.1	69.3	108.6	131.4	122.7	7,475	9,479	8,500
Sorghum	11.1	13.3	11.2	9.9	12.2	10.0	59.3	72.8	66.0	585	884	660
Barley	8.9	7.8	7.7	8.4	7.3	7.1	55.2	62.4	57.0	464	456	405
Oats	8.7	8.0	8.1	4.8	4.5	4.4	50.7	65.6	55.5	243	295	245
							---Pounds per acre---			---Million CWT---		
Rice	2.9	3.2	3.1	2.8	3.1	3.1	5,674	5,722	5,655	157.5	179.1	173.0
										---Million 480-pound bales---		
All Cotton	14.1	13.2	13.4	13.0	11.1	12.4	652	699	680	17.6	16.2	17.5

1/ See note at bottom of page 2 referencing the grains 1993/94 forecasts. Soybean and cotton planted acres are reported in the March 31 Prospective Plantings. Soybean harvested acres are based on average planted-to-harvested ratios for 1989-92 and projected yield is based on 1972-92 regional trends, weighted by acres. Cotton harvested acres are based on average 1983-92 average acreage abandonment, by State, of 8 percent. Projected yield is based on 1973-92 State trends, weighted by area.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America		Europe		FSU-12	Asia				South America		Selected Other		All Other Countries					
			United States		Canada	Mexico		EC-12	Oth. W. Europe	Eastern Europe	China	India	Indo-nesia	Paki-stan	Thai-land		Argen-tina	Brazil	Aus-tralia	South Africa	Turkey
——Million metric tons——																					
<u>Wheat</u>																					
1991/92	542.1	488.2	53.9	31.9	3.7	90.1	4.1	38.3	70.9	96.0	55.1	0.0	14.6	0.0	9.9	3.1	10.7	2.1	16.5	41.1	
1992/93 prel.	557.5	490.6	66.9	29.9	3.0	84.6	3.7	26.6	87.9	101.0	55.1	0.0	15.7	0.0	9.2	2.8	15.4	1.3	15.7	38.9	
1993/94 proj.																					
May	548.8	480.5	68.2	28.0	3.5	82.1	3.9	32.5	77.3	96.0	55.0	0.0	15.5	0.0	10.5	2.5	16.0	2.1	16.2	39.4	
<u>Coarse Grains</u>																					
1991/92	800.2	581.5	218.6	21.8	17.6	89.6	12.5	64.5	76.2	112.3	26.3	5.4	1.6	3.8	14.5	29.3	7.5	3.4	9.6	85.7	
1992/93 prel.	854.2	576.4	277.7	19.5	17.8	82.0	9.4	44.2	92.3	109.6	36.8	5.6	1.6	3.8	15.4	28.8	8.3	9.1	9.0	83.4	
1993/94 proj.																					
May	816.7	571.4	245.3	21.9	17.2	77.1	10.6	51.2	90.5	106.0	31.2	5.7	1.7	3.9	14.1	27.8	8.5	8.6	9.5	86.1	
<u>Rice (Milled)</u>																					
1991/92	348.1	343.1	5.0	0.0	0.2	1.5	0.0	0.1	1.3	128.7	73.7	29.0	3.2	13.5	0.4	6.9	0.7	0.0	0.1	83.8	
1992/93 prel.	350.9	345.2	5.7	0.0	0.2	1.4	0.0	0.1	1.4	129.5	72.0	30.7	3.0	13.1	0.3	7.1	0.7	0.0	0.2	85.5	
1993/94 proj.																					
May	347.5	342.0	5.5																		
<u>Total Grains 1/</u>																					
1991/92	1,690.3	1,412.8	277.6	53.7	21.5	181.3	16.7	102.8	148.4	336.9	155.1	34.4	19.4	17.2	24.8	39.2	18.9	5.6	26.2	210.6	
1992/93 prel.	1,762.6	1,412.3	350.4	49.4	21.0	168.0	13.0	70.9	181.5	340.1	163.8	36.3	20.4	16.9	24.9	38.7	24.3	10.4	24.9	207.8	
1993/94 proj.																					
May	1,713.0	1,393.9	319.0																		
<u>Oilseeds 2/</u>																					
1990/91	216.0	155.4	60.6	4.6	1.1	12.9	0.7	4.2	12.8	33.3	20.5	4.2	3.6	0.9	16.8	17.1	1.0	0.9	2.1	18.5	
1991/92 prel.	223.9	159.5	64.3	5.8	1.3	13.3	0.7	4.3	11.5	34.2	21.0	4.4	4.8	0.8	15.9	20.6	1.1	0.4	1.7	17.8	
1992/93 proj.																					
April	226.3	157.6	68.7	5.1	0.7	12.1	0.7	4.0	10.7	31.4	23.4	4.6	3.5	0.7	15.7	22.5	0.9	0.7	2.1	18.6	
May	226.8	158.0	68.8	5.1	1.0	12.1	0.7	4.0	10.5	31.4	23.6	4.6	3.5	0.7	15.6	22.9	0.9	0.7	2.1	18.6	
——Million 480-pound bales——																					
<u>Cotton</u>																					
1990/91	87.0	71.5	15.5	0.0	0.8	1.3	0.0	0.1	7.3	20.7	9.1	0.0	7.5	0.1	1.4	3.2	2.0	0.2	3.0	14.6	
1991/92 prel.	96.0	78.4	17.6	0.0	0.8	1.4	0.0	0.1	6.8	26.1	9.4	0.0	10.0	0.2	1.1	3.4	2.3	0.1	2.6	14.0	
1992/93 proj.																					
April	83.4	67.2	16.2	0.0	0.1	1.6	0.0	0.1	6.0	20.8	10.2	0.0	7.1	0.1	0.8	2.6	1.6	0.1	2.8	13.2	
May	82.5	66.3	16.2	0.0	0.1	1.4	0.0	0.1	6.0	20.8	10.2	0.0	7.1	0.1	0.7	2.2	1.6	0.1	2.8	13.1	

1/ Includes wheat, coarse grains, and rice (milled) shown above. See note at bottom of page 2 referencing the U.S. forecast.

2/ Includes soybean, cottonseed, peanut (in-shell), sunflowerseed, rapeseed, copra, and palm kernel.

Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area			Yield			Production			Change in Production	
	Prel.			Prel.			Prel.				
	1991/92	1992/93	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	From last year	
			May			May			May		
		Million hectares		Metric tons per hectare			Million metric tons			MMT	Percent
World	222.03	221.18	222.70	2.44	2.52	2.46	542.09	557.52	548.75	-8.76	-1.57
United States *	23.35	25.26	26.11	2.31	2.65	2.61	53.92	66.92	68.25	1.33	1.99
Total Foreign	198.68	195.92	196.59	2.46	2.50	2.44	488.17	490.60	480.51	-10.09	-2.06
<i>Major Exporters</i>											
EC-12	42.70	44.10	44.37	3.34	3.15	3.08	142.65	139.06	136.63	-2.43	-1.75
France	16.81	16.97	15.72	5.36	4.99	5.23	90.13	84.59	82.13	-2.46	-2.91
United Kingdom	5.20	5.20	4.90	6.65	6.31	6.43	34.60	32.80	31.50	-1.30	-3.96
Germany	1.98	2.06	1.86	7.27	6.65	6.83	14.40	13.70	12.70	-1.00	-7.30
Canada	2.45	2.60	2.41	6.77	5.98	6.44	16.61	15.54	15.50	-0.04	-0.27
Australia	14.16	13.83	13.15	2.26	2.16	2.13	31.95	29.87	28.00	-1.87	-6.26
Argentina	7.18	9.10	10.50	1.49	1.69	1.52	10.69	15.40	16.00	0.60	3.90
	4.55	4.20	5.00	2.17	2.19	2.10	9.88	9.20	10.50	1.30	14.13
<i>Major Importers</i>											
China	95.47	92.84	91.10	2.34	2.47	2.41	223.20	229.49	219.44	-10.05	-4.38
FSU-12	30.95	30.65	30.50	3.10	3.30	3.15	96.00	101.00	96.00	-5.00	-4.95
Baltic States	45.56	45.29	43.48	1.56	1.94	1.78	70.88	87.85	77.25	-10.60	-12.07
Eastern Europe	0.37	0.45	0.44	2.99	1.75	2.84	1.10	0.78	1.25	0.47	60.26
Poland	9.87	8.12	8.99	3.88	3.28	3.61	38.26	26.62	32.47	5.86	22.00
Romania	2.44	2.41	2.40	3.80	3.06	3.77	9.27	7.37	9.05	1.68	22.86
Hungary	2.18	1.48	2.10	2.52	2.16	2.62	5.49	3.18	5.50	2.32	73.01
Other N. Africa	1.15	0.82	0.95	5.18	4.27	4.74	5.95	3.48	4.50	1.02	29.31
Morocco	5.59	5.20	4.77	1.55	0.97	0.97	8.65	5.07	4.60	-0.47	-9.20
Egypt	2.64	2.23	1.80	1.87	0.70	0.78	4.94	1.56	1.40	-0.16	-10.37
Brazil	0.76	0.88	0.88	5.90	5.26	5.23	4.48	4.62	4.60	-0.02	-0.37
	2.15	2.05	1.83	1.43	1.37	1.37	3.08	2.80	2.50	-0.30	-10.71
<i>Other Foreign</i>											
India	60.27	58.77	60.92	2.02	2.06	2.03	121.56	121.29	123.67	2.38	1.96
Turkey	24.17	22.98	23.70	2.28	2.40	2.32	55.13	55.09	55.00	-0.09	-0.16
Pakistan	8.80	8.80	8.80	1.87	1.78	1.84	16.50	15.70	16.20	0.50	3.18
Other W. Europe	7.91	7.85	8.20	1.84	2.00	1.89	14.57	15.68	15.50	-0.18	-1.17
Iran	0.79	0.74	0.77	5.24	4.92	5.07	4.14	3.65	3.93	0.28	7.59
Mexico	6.65	7.20	7.20	1.34	1.42	1.42	8.90	10.20	10.20	0.00	0.00
Saudi Arabia	0.88	0.73	0.85	4.20	4.14	4.12	3.70	3.00	3.50	0.50	16.67
Rep. of South Africa	0.74	0.74	0.68	5.22	5.54	5.51	3.86	4.10	3.75	-0.35	-8.54
Others	1.43	0.74	1.50	1.49	1.71	1.40	2.13	1.27	2.10	0.83	65.48
	8.90	8.98	9.21	1.42	1.40	1.46	12.63	12.60	13.49	0.89	7.08

* See note at bottom of page 2 referencing the U.S. forecast.

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 4

Total Coarse Grain Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area			Yield			Production			Change in Production	
	Prel.		1993/94 Proj.	Prel.		1993/94 Proj.	Prel.		1993/94 Proj.	From last year	
	1991/92	1992/93	May	1991/92	1992/93	May	1991/92	1992/93	May		
	Million hectares			Metric tons per hectare			Million metric tons			MMT	Percent
World	317.37	318.07	314.41	2.52	2.69	2.60	800.17	854.18	816.72	-37.46	-4.38
United States *	37.37	39.05	36.90	5.85	7.11	6.65	218.63	277.75	245.29	-32.46	-11.69
Total Foreign	280.00	279.02	277.52	2.08	2.07	2.06	581.53	576.43	571.43	-5.00	-0.87
<i>Major Exporters</i>	20.53	20.76	21.64	2.48	2.70	2.63	50.89	56.00	56.92	0.92	1.64
Canada	6.59	6.13	6.98	3.30	3.18	3.13	21.78	19.49	21.85	2.36	12.09
Argentina	3.80	4.13	3.88	3.80	3.72	3.64	14.45	15.36	14.11	-1.25	-8.14
Australia	4.51	4.75	5.18	1.66	1.74	1.64	7.47	8.25	8.48	0.23	2.79
Rep. of South Africa	4.14	4.34	4.19	0.83	2.11	2.06	3.44	9.15	8.60	-0.54	-5.96
Thailand	1.49	1.41	1.42	2.52	2.66	2.73	3.75	3.75	3.88	0.13	3.47
<i>Major Importers</i>	101.57	100.21	98.63	2.62	2.49	2.55	266.04	249.30	251.29	2.00	0.80
FSU-12	52.17	51.76	52.57	1.46	1.78	1.72	76.21	92.27	90.50	-1.77	-1.92
Baltic States	1.69	1.66	1.61	2.48	1.42	2.17	4.19	2.36	3.50	1.14	48.31
EC-12	19.07	18.24	16.67	4.70	4.50	4.62	89.63	82.01	77.10	-4.91	-5.98
Germany	4.11	3.92	3.83	5.52	4.90	5.35	22.66	19.19	20.50	1.31	6.81
France	4.00	4.15	3.69	6.45	6.63	6.52	25.78	27.48	24.09	-3.39	-12.33
Eastern Europe	16.59	16.61	15.86	3.89	2.66	3.23	64.52	44.22	51.16	6.95	15.71
Poland	6.28	5.92	6.05	2.95	2.13	2.77	18.54	12.59	16.75	4.16	33.02
Romania	3.87	4.30	3.99	3.56	2.11	2.66	13.78	9.07	10.60	1.54	16.94
Czechoslovakia	1.17	1.25	0.87	4.67	3.75	4.37	5.49	4.67	3.78	-0.89	-19.06
Mexico	8.84	8.94	8.95	1.99	1.99	1.92	17.63	17.75	17.15	-0.60	-3.38
Other W. Europe	2.85	2.67	2.65	4.39	3.51	4.01	12.52	9.38	10.61	1.23	13.06
Sweden	0.89	0.86	0.81	4.15	2.76	3.95	3.69	2.37	3.21	0.84	35.67
<i>Other Foreign</i>	157.54	157.73	156.93	1.67	1.71	1.67	263.26	269.82	261.94	-7.88	-2.92
China	26.94	26.33	25.77	4.17	4.16	4.12	112.28	109.60	106.04	-3.56	-3.25
India	33.77	35.33	35.09	0.78	1.04	0.89	26.28	36.75	31.20	-5.55	-15.10
Brazil	14.10	13.51	13.51	2.08	2.13	2.06	29.29	28.78	27.78	-1.00	-3.48
Turkey	4.45	4.45	4.45	2.17	2.03	2.14	9.65	9.05	9.54	0.49	5.42
Nigeria	9.50	9.55	9.70	0.85	0.84	0.85	8.05	8.05	8.25	0.20	2.48
Indonesia	2.90	3.00	3.05	1.86	1.87	1.85	5.40	5.60	5.65	0.05	0.89
Philippines	3.48	3.39	3.55	1.29	1.35	1.32	4.49	4.57	4.70	0.13	2.84
Others	62.40	62.17	61.83	1.09	1.08	1.11	67.82	67.42	68.79	1.36	2.02

* See note at bottom of page 2 referencing the U.S. forecast.

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TABLE 5
Corn Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area			Yield			Production			Change in Production	
	Prel.			Prel.			Prel.				
	1991/92	1992/93	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	From last year	
			May			May			May		
								Million metric tons		MMT	Percent
World	130.77	131.88	130.19	3.70	4.01	3.86	484.37	528.31	502.08	-26.23	-4.96
United States *	27.86	29.20	28.05	6.82	8.25	7.70	189.89	240.78	215.91	-24.87	-10.33
Total Foreign	102.90	102.68	102.15	2.86	2.80	2.80	294.48	287.53	286.17	-1.36	-0.47
<i>Major Exporters</i>											
Argentina	7.20	7.59	7.27	2.41	3.11	3.05	17.33	23.60	22.20	-1.40	-5.93
Rep. of South Africa	2.40	2.70	2.50	4.42	4.26	4.20	10.60	11.50	10.50	-1.00	-8.70
Thailand	3.45	3.62	3.50	0.91	2.35	2.29	3.13	8.50	8.00	-0.50	-5.88
	1.35	1.27	1.27	2.67	2.83	2.91	3.60	3.60	3.70	0.10	2.78
<i>Major Importers</i>											
Eastern Europe	21.66	22.00	21.47	4.02	3.37	3.58	87.01	74.10	76.93	2.83	3.81
Romania	6.76	7.53	6.90	5.00	2.90	3.59	33.79	21.83	24.75	2.92	13.38
Yugoslavia	2.60	3.34	3.00	4.05	2.05	2.67	10.50	6.83	8.00	1.17	17.16
EC-12	2.17	2.20	2.00	5.34	3.00	3.75	11.56	6.60	7.50	0.90	13.64
France	3.90	3.82	3.41	6.83	7.57	7.40	26.68	28.92	25.24	-3.69	-12.74
Italy	1.78	1.85	1.65	7.25	7.89	7.58	12.90	14.60	12.50	-2.10	-14.38
Mexico	0.86	0.88	0.87	7.26	8.63	8.05	6.24	7.58	7.00	-0.58	-7.60
FSU-12	7.70	7.90	8.00	1.88	1.90	1.84	14.50	15.00	14.70	-0.30	-2.00
Other W. Europe	2.98	2.45	2.87	3.28	2.67	3.54	9.76	6.54	10.15	3.61	55.29
Others	0.22	0.20	0.20	8.41	6.63	8.14	1.81	1.34	1.62	0.28	20.90
	0.10	0.10	0.10	4.67	4.89	4.92	0.47	0.47	0.47	-0.00	-0.42
<i>Other Foreign</i>											
China	74.05	73.09	73.40	2.57	2.60	2.55	190.15	189.83	187.04	-2.79	-1.47
Brazil	21.57	21.00	20.50	4.58	4.57	4.51	98.77	96.00	92.50	-3.50	-3.65
India	13.60	13.00	13.00	2.10	2.15	2.08	28.50	28.00	27.00	-1.00	-3.57
Canada	5.78	6.07	5.90	1.38	1.70	1.53	7.98	10.30	9.00	-1.30	-12.62
Indonesia	1.11	0.86	1.05	6.71	5.70	6.19	7.41	4.88	6.50	1.62	33.11
Philippines	2.90	3.00	3.05	1.86	1.87	1.85	5.40	5.60	5.65	0.05	0.89
Egypt	3.48	3.39	3.55	1.29	1.35	1.32	4.49	4.57	4.70	0.13	2.84
Tanzania	0.69	0.75	0.77	6.39	6.00	6.10	4.43	4.50	4.70	0.20	4.44
Zimbabwe	1.85	1.90	1.80	1.24	1.16	1.28	2.30	2.20	2.30	0.10	4.55
Others	0.88	1.20	1.20	0.59	1.67	1.67	0.52	2.00	2.00	0.00	0.00
	22.18	21.92	22.58	1.37	1.45	1.45	30.35	31.78	32.69	0.91	2.88

* See note at bottom of page 2 referencing the U.S. forecast.

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TABLE 6
Barley Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area		Yield		Production		Change in Production	
	Prel.		Prel.		Prel.			
	1991/92	1992/93	1991/92	1992/93	1991/92	1992/93	1993/94 Proj.	From last year
	Million hectares		Metric tons per hectare		Million metric tons			MMT Percent
World	75.86	72.05	2.23	2.29	169.01	164.67	162.50	-2.16 -1.31
United States *	3.41	2.96	2.97	3.36	10.11	9.94	8.82	-1.12 -11.25
Total Foreign	72.45	69.09	2.19	2.24	158.90	154.73	153.68	-1.05 -0.68
EC-12	12.04	11.44	4.28	3.77	51.50	43.07	41.13	-1.94 -4.51
Denmark	0.94	0.90	5.34	3.34	5.04	3.02	3.80	0.78 25.74
France	1.75	1.80	6.17	5.86	10.80	10.55	9.50	-1.05 -9.95
Germany	2.54	2.41	5.72	5.06	14.49	12.20	12.40	0.20 1.67
Italy	0.47	0.44	3.80	3.87	1.79	1.68	1.50	-0.18 -10.82
Spain	4.37	4.01	2.09	1.49	9.14	5.99	5.60	-0.39 -6.57
United Kingdom	1.39	1.31	5.54	5.61	7.70	7.35	6.00	-1.35 -18.37
FSU-12	27.44	25.62	1.40	1.99	38.43	51.09	49.15	-1.94 -3.79
Baltic States	1.24	1.11	2.49	1.54	3.08	1.71	2.36	0.65 37.72
Eastern Europe	4.01	3.65	3.70	3.09	14.83	11.28	11.92	0.65 5.76
Poland	1.24	1.20	3.44	2.35	4.26	2.82	3.80	0.98 34.70
Czechoslovakia	0.79	0.89	4.79	3.99	3.79	3.54	2.30	-1.24 -35.03
Romania	1.02	0.62	2.89	2.71	2.95	1.68	2.10	0.42 25.15
Canada	4.22	3.70	2.75	2.95	11.62	10.92	11.70	0.78 7.15
Other W. Europe	1.54	1.41	4.19	3.46	6.43	4.88	5.25	0.37 7.50
Finland	0.54	0.47	3.73	3.24	2.02	1.53	1.60	0.07 4.51
Sweden	0.46	0.43	4.21	2.92	1.94	1.26	1.60	0.34 26.88
Turkey	3.40	3.40	2.00	1.82	6.80	6.20	6.60	0.40 6.45
Australia	2.70	2.96	1.66	1.88	4.47	5.56	5.10	-0.46 -8.32
China	1.20	1.25	3.27	3.20	3.93	4.00	4.00	0.00 0.00
Iran	2.50	2.60	1.32	1.42	3.30	3.70	3.70	0.00 0.00
Morocco	2.36	2.23	1.38	0.48	3.25	1.08	0.90	-0.18 -16.74
India	0.96	0.94	1.70	1.75	1.63	1.65	1.70	0.05 3.03
Others	8.86	8.79	1.09	1.09	9.63	9.59	10.17	0.59 6.12

* See note at bottom of page 2 referencing the U.S. forecast.

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TABLE 7

Oats Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area		Yield		Production			Change in Production	
	Prel.		Prel.		Prel.		1993/94 Proj.	From last year	MMT Percent
	1991/92	1992/93	1991/92	1992/93	1991/92	1992/93			
		May		May		May			
		Million hectares		Metric tons per hectare		Million metric tons			
World	20.11	19.98	20.48	1.68	32.76	33.88	34.49	0.62	1.82
United States *	1.95	1.82	1.79	1.99	3.53	4.28	3.56	-0.72	-16.84
Total Foreign	18.16	18.16	18.70	1.65	29.23	29.60	30.94	1.34	4.52
FSU-12	10.42	10.18	10.53	1.33	12.34	14.31	14.03	-0.28	-1.93
Baltic States	0.22	0.20	0.20	1.88	0.52	0.20	0.38	0.18	87.50
<i>Maj. Foreign Exporters</i>									
Canada	2.68	3.11	3.25	1.97	5.29	5.94	6.40	0.46	7.69
Sweden	0.84	1.24	1.35	2.22	1.79	2.82	3.00	0.18	6.27
Australia	0.35	0.34	0.30	4.00	1.43	0.81	1.20	0.39	48.70
Argentina	1.14	1.18	1.25	1.40	1.67	1.86	1.75	-0.11	-6.07
	0.35	0.35	0.35	1.29	0.40	0.45	0.45	0.00	0.00
<i>Other Foreign</i>									
China	4.85	4.67	4.71	2.15	11.08	9.15	10.13	0.98	10.72
EC-12	0.55	0.54	0.54	1.19	0.65	0.64	0.64	0.00	0.00
France	1.38	1.27	1.24	3.07	4.39	3.58	3.80	0.22	6.26
Germany	0.18	0.17	0.15	4.48	0.74	0.70	0.65	-0.05	-7.14
Italy	0.38	0.36	0.35	4.56	1.87	1.31	1.60	0.29	21.77
United Kingdom	0.15	0.15	0.14	2.29	0.36	0.33	0.32	-0.01	-3.90
Eastern Europe	0.10	0.11	0.10	5.00	0.55	0.53	0.50	-0.03	-4.76
Czechoslovakia	1.20	1.20	1.28	2.31	2.92	2.24	2.94	0.70	31.25
Poland	0.09	0.09	0.09	3.53	0.35	0.26	0.30	0.04	17.65
Yugoslavia	0.69	0.67	0.70	2.57	1.87	1.23	1.80	0.57	46.70
Finland	0.13	0.05	0.10	1.80	0.25	0.09	0.18	0.09	100.00
Norway	0.34	0.33	0.33	3.33	1.16	1.06	1.10	0.04	3.97
Turkey	0.12	0.11	0.11	2.67	0.54	0.29	0.29	0.00	0.00
Brazil	0.15	0.15	0.15	1.93	0.28	0.28	0.28	0.00	0.00
Others	0.20	0.20	0.20	1.10	0.22	0.22	0.22	0.00	0.00
	0.91	0.87	0.87	0.98	0.93	0.84	0.86	0.01	1.78

* See note at bottom of page 2 referencing the U.S. forecast.

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 8

Rye Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area		Yield		Production		Change in Production	
	Prel. 1993/94 Proj.		Prel. 1993/94 Proj.		Prel. 1993/94 Proj.			
	1991/92	1992/93	1991/92	1992/93	1991/92	1992/93	May	From last year
		Million hectares	Metric tons per hectare		Million metric tons			MMT Percent
World	13.16	14.93	2.08	1.87	27.32	27.94	26.64	-1.29 -4.63
United States *	0.16	0.16	1.55	1.85	0.25	0.30	0.24	-0.06 -20.72
Total Foreign	13.00	14.77	2.08	1.87	27.07	27.63	26.40	-1.23 -4.45
FSU-12	8.30	10.51	1.69	1.73	14.06	18.19	14.46	-3.72 -20.48
Baltic States	0.26	0.35	2.24	1.29	0.59	0.45	0.77	0.32 71.11
<i>Major Exporter</i>								
Canada	0.18	0.14	1.87	1.92	0.34	0.27	0.23	-0.04 -13.21
<i>Other Foreign</i>								
Eastern Europe	4.25	3.77	2.84	2.32	12.08	8.73	10.94	2.21 25.31
Hungary	2.62	2.27	2.60	1.99	6.80	4.51	6.19	1.68 37.22
Poland	0.09	0.07	2.38	2.00	0.22	0.14	0.17	0.03 21.43
Czechoslovakia	2.29	2.03	2.58	1.96	5.90	3.99	5.50	1.51 37.98
EC-12	0.13	0.09	3.81	2.90	0.48	0.26	0.38	0.13 49.02
Denmark	1.20	1.08	3.67	3.16	4.39	3.42	3.91	0.49 14.20
France	0.08	0.09	4.94	3.62	0.40	0.33	0.34	0.01 2.10
Germany	0.06	0.06	3.50	3.73	0.21	0.21	0.19	-0.01 -7.32
Spain	0.71	0.62	4.68	3.94	3.32	2.42	3.00	0.58 23.86
Other W. Europe	0.20	0.19	1.23	1.24	0.24	0.23	0.20	-0.03 -13.04
Austria	0.14	0.12	4.00	3.91	0.57	0.47	0.52	0.06 12.69
Sweden	0.09	0.07	4.12	4.03	0.35	0.28	0.25	-0.03 -10.07
Turkey	0.04	0.03	3.93	4.12	0.17	0.14	0.18	0.04 32.35
Others	0.17	0.17	1.41	1.41	0.24	0.24	0.23	-0.01 -4.17
	0.13	0.13	0.67	0.70	0.08	0.09	0.08	-0.01 -5.62

* See note at bottom of page 2 referencing the U.S. forecast.

May 1993

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 9
Sorghum Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area			Yield			Production			Change in Production	
	1991/92 1992/93			1991/92 1992/93			1991/92 1992/93				
	Prel.	1993/94 Proj.	May	Prel.	1993/94 Proj.	May	Prel.	1993/94 Proj.	May	From last year	
		Million hectares			Metric tons per hectare			Million metric tons		MMT	Percent
World	38.10	39.88	38.77	1.35	1.56	1.40	51.35	62.32	54.41	-7.91	-12.69
United States *	3.99	4.92	4.05	3.72	4.57	4.14	14.86	22.46	16.77	-5.69	-25.34
Total Foreign	34.11	34.96	34.72	1.07	1.14	1.08	36.50	39.86	37.64	-2.22	-5.57
India	12.59	13.50	13.50	0.67	0.95	0.78	8.40	12.80	10.50	-2.30	-17.97
China	1.39	1.34	1.30	3.55	3.55	3.62	4.93	4.76	4.70	-0.06	-1.26
Mexico	0.82	0.70	0.60	3.17	3.14	3.17	2.60	2.20	1.90	-0.30	-13.64
Nigeria	4.40	4.80	4.60	0.80	0.79	0.80	3.50	3.80	3.70	-0.10	-2.63
Sudan	4.40	4.20	4.20	0.80	0.70	0.70	3.52	2.94	2.94	0.00	0.00
Argentina	0.72	0.75	0.70	3.84	3.73	3.57	2.77	2.80	2.50	-0.30	-10.71
Australia	0.53	0.48	0.65	1.98	0.99	2.08	1.06	0.48	1.35	0.87	182.43
Ethiopia	0.95	0.90	0.90	1.05	1.11	1.11	1.00	1.00	1.00	0.00	0.00
Colombia	0.24	0.25	0.26	3.00	3.00	3.00	0.72	0.75	0.77	0.02	2.00
Venezuela	0.27	0.24	0.23	2.18	2.20	2.15	0.58	0.53	0.50	-0.03	-5.30
Egypt	0.13	0.13	0.13	4.70	4.73	4.77	0.62	0.62	0.62	0.01	0.81
Yemen	0.61	0.61	0.61	1.00	1.00	1.00	0.61	0.61	0.61	0.00	0.00
Tanzania	0.55	0.65	0.65	0.95	0.92	0.92	0.53	0.60	0.60	0.00	0.00
Niger	1.40	1.30	1.30	0.39	0.35	0.35	0.55	0.45	0.45	0.00	0.00
Rep. of South Africa	0.14	0.17	0.14	0.73	2.06	2.07	0.10	0.35	0.29	-0.06	-17.14
Thailand	0.14	0.14	0.15	1.07	1.07	1.20	0.15	0.15	0.18	0.03	20.00
Others	21.38	21.32	21.07	1.31	1.26	1.28	27.95	26.91	26.96	0.05	0.19

* See note at bottom of page 2 referencing the U.S. forecast.

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 10

Rice Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production (Milled)				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	147.05	145.86	146.44	145.65	2.38	2.39	2.40	2.41	350.55	348.09	351.77	350.81	-0.96	-0.27	2.73	0.78
United States	1.14	1.12	1.27	1.27	4.46	4.48	4.49	4.49	5.10	5.04	5.69	5.69	0.00	0.00	0.65	12.93
Total Foreign	145.91	144.74	145.18	144.39	2.37	2.37	2.38	2.39	345.46	343.05	346.08	345.13	-0.96	-0.28	2.08	0.61
Major Exporters																
Thailand	15.70	15.67	16.38	16.38	1.44	1.54	1.46	1.46	22.56	24.13	23.94	23.94	0.00	0.00	-0.20	-0.81
Burma	8.79	9.05	9.60	9.60	1.29	1.49	1.36	1.36	11.35	13.46	13.10	13.10	0.00	0.00	-0.36	-2.70
Pakistan	4.80	4.52	4.86	4.86	1.66	1.64	1.61	1.61	7.94	7.42	7.80	7.80	0.00	0.00	0.38	5.06
	2.11	2.10	1.93	1.93	1.54	1.55	1.58	1.58	3.27	3.24	3.04	3.04	0.00	0.00	-0.21	-6.38
Major Importers																
Indonesia	13.97	13.70	14.35	14.35	2.79	2.80	2.79	2.79	39.04	38.36	40.03	40.03	0.00	0.00	1.67	4.35
Rep. of Korea	10.50	10.28	10.87	10.87	2.80	2.82	2.83	2.83	29.37	29.04	30.75	30.75	0.00	0.00	1.70	5.86
EC-12	1.24	1.21	1.16	1.16	4.51	4.45	4.61	4.61	5.61	5.39	5.33	5.33	0.00	0.00	-0.05	-1.00
Iran	0.37	0.37	0.36	0.36	4.31	4.05	3.94	3.94	1.61	1.49	1.41	1.41	0.00	0.00	-0.07	-4.98
Nigeria	0.49	0.58	0.65	0.65	2.65	2.52	2.31	2.31	1.30	1.45	1.50	1.50	0.00	0.00	0.05	3.45
	0.65	0.60	0.66	0.66	0.83	0.80	0.82	0.82	0.54	0.48	0.54	0.54	0.00	0.00	0.06	12.50
Other Foreign																
China	115.53	114.69	113.79	113.00	2.45	2.44	2.47	2.48	283.24	280.05	281.62	280.67	-0.96	-0.34	0.62	0.22
India	33.06	32.59	31.97	31.97	4.01	3.95	4.05	4.05	132.53	128.67	129.50	129.50	0.00	0.00	0.83	0.65
Bangladesh	42.69	42.31	42.00	41.20	1.74	1.74	1.74	1.75	74.29	73.66	73.00	72.00	-1.00	-1.37	-1.66	-2.25
Vietnam	10.44	10.24	10.13	10.13	1.71	1.78	1.80	1.80	17.85	18.25	18.27	18.27	0.00	0.00	0.02	0.11
Japan	6.27	6.27	6.30	6.30	1.98	2.31	2.20	2.20	12.43	14.45	13.86	13.86	0.00	0.00	-0.59	-4.11
Brazil	2.07	2.05	2.11	2.11	4.61	4.27	4.57	4.57	9.55	8.74	9.62	9.62	0.00	0.00	0.88	10.08
Philippines	4.55	5.00	5.00	5.00	1.49	1.37	1.43	1.43	6.80	6.87	7.14	7.14	0.00	0.00	0.27	3.96
Taiwan	3.43	3.29	3.27	3.27	1.87	1.81	1.83	1.83	6.43	5.93	5.97	5.97	0.00	0.00	0.04	0.62
FSU-12	0.45	0.43	0.43	0.43	3.66	3.90	3.84	3.84	1.66	1.67	1.65	1.65	0.00	0.00	-0.02	-1.37
Colombia	0.61	0.60	0.65	0.65	2.30	2.16	2.15	2.15	1.41	1.30	1.39	1.39	0.00	0.00	0.09	6.87
Others	0.44	0.42	0.45	0.45	2.60	2.62	2.67	2.67	1.13	1.10	1.20	1.20	0.00	0.00	0.10	9.09
	11.51	11.50	11.50	11.51	1.66	1.69	1.74	1.74	19.15	19.41	20.03	20.07	0.04	0.22	0.66	3.42

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 11

Total Oilseed Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	MMT	Percent	MMT	Percent
World Total 1/	--	--	--	--	--	--	--	--	216.00	223.86	226.27	226.81	0.54	0.24	2.95	1.32
Total Foreign 1/	--	--	--	--	--	--	--	--	155.45	159.54	157.60	158.02	0.43	0.27	-1.52	-0.95
Copra	--	--	--	--	--	--	--	--	4.76	4.82	4.84	4.89	0.05	1.03	0.07	1.51
Palm Kernel	--	--	--	--	--	--	--	--	3.32	3.41	3.63	3.63	0.00	0.00	0.22	6.43
World Major Oilseeds 2/	141.32	147.02	145.82	146.11	1.47	1.47	1.49	1.49	207.92	215.63	217.80	218.29	0.49	0.22	2.66	1.23
United States 2/	29.13	30.69	29.71	29.71	2.08	2.10	2.31	2.31	60.55	64.32	68.67	68.78	0.11	0.16	4.47	6.94
Foreign Oilseeds 2/	112.19	116.33	116.11	116.40	1.31	1.30	1.28	1.28	147.36	151.31	149.13	149.50	0.38	0.25	-1.81	-1.20
China	22.27	23.32	23.68	23.68	1.50	1.47	1.33	1.33	33.33	34.21	31.43	31.39	-0.04	-0.11	-2.82	-8.23
Brazil	11.67	12.05	12.52	12.41	1.46	1.71	1.80	1.84	17.08	20.56	22.50	22.88	0.38	1.69	2.32	11.31
India	25.73	27.76	27.92	27.98	0.78	0.74	0.82	0.83	20.12	20.50	22.99	23.11	0.12	0.52	2.61	12.73
Argentina	7.90	8.34	7.99	7.94	2.12	1.90	1.97	1.95	16.76	15.89	15.75	15.50	-0.24	-1.56	-0.38	-2.42
FSU-12	9.10	8.81	8.76	8.96	1.41	1.31	1.22	1.18	12.81	11.53	10.66	10.54	-0.12	-1.10	-0.99	-8.57
Canada	3.08	3.82	3.52	3.52	1.51	1.52	1.46	1.46	4.64	5.82	5.14	5.14	0.00	0.00	-0.68	-11.65
EC-12	5.76	5.58	5.71	5.71	2.25	2.38	2.12	2.12	12.93	13.28	12.12	12.13	0.01	0.04	-1.16	-8.70
France	1.95	1.81	1.74	1.74	2.36	2.72	2.48	2.48	4.60	4.92	4.30	4.30	0.00	0.00	-0.62	-12.57
Italy	0.71	0.57	0.46	0.46	3.09	2.99	2.98	2.98	2.20	1.71	1.38	1.38	0.00	0.00	-0.33	-19.24
Germany	0.75	1.00	1.07	1.07	2.90	3.11	2.61	2.61	2.17	3.09	2.79	2.79	0.00	0.00	-0.30	-9.83
Spain	1.33	1.16	1.45	1.45	1.14	0.91	1.03	1.03	1.51	1.07	1.50	1.50	0.00	0.00	0.43	40.38
United Kingdom	0.39	0.44	0.42	0.42	3.08	2.96	3.00	3.00	1.20	1.30	1.26	1.26	0.00	0.00	-0.04	-3.08
Indonesia	1.90	1.97	2.06	2.06	1.20	1.22	1.22	1.22	2.27	2.40	2.51	2.51	0.00	0.00	0.12	4.80
Pakistan	3.10	3.35	2.93	3.14	1.18	1.42	1.20	1.11	3.65	4.77	3.51	3.50	-0.00	-0.11	-1.27	-26.56
Eastern Europe	2.34	2.33	2.45	2.45	1.81	1.86	1.64	1.64	4.24	4.32	4.00	4.00	0.00	0.00	-0.32	-7.30
Poland	0.50	0.47	0.42	0.42	2.41	2.23	1.88	1.88	1.21	1.04	0.79	0.79	0.00	0.00	-0.26	-24.74
Romania	0.60	0.59	0.72	0.72	1.18	1.35	1.14	1.14	0.71	0.80	0.82	0.82	0.00	0.00	0.02	2.37
Hungary	0.43	0.42	0.41	0.41	1.88	1.99	1.95	1.95	0.81	0.84	0.80	0.80	0.00	0.00	-0.04	-4.53
Turkey	1.43	1.23	1.41	1.41	1.45	1.37	1.47	1.47	2.08	1.69	2.07	2.07	0.00	0.00	0.39	22.97
Philippines	0.07	0.07	0.08	0.08	0.70	0.73	0.72	0.73	0.05	0.05	0.06	0.06	-0.00	-3.51	0.00	1.85
Paraguay	1.48	1.42	1.37	1.40	1.19	1.12	1.55	1.57	1.77	1.60	2.12	2.19	0.07	3.30	0.60	37.21
Mexico	0.56	0.68	0.37	0.45	1.83	1.66	1.61	1.72	1.02	1.13	0.59	0.77	0.18	30.02	-0.36	-31.89
Others	15.81	15.62	15.35	15.23	0.92	0.87	0.89	0.90	14.62	13.58	13.68	13.71	0.02	0.18	0.12	0.90

1/ Major oilseeds plus copra and palm kernel. 2/ Individual countries and regions include soybean, cottonseed, peanut (in-shell), sunflowerseed, and rapeseed.

TABLE 12
Soybean Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	MMT	Percent	MMT	Percent
World	54.27	54.77	56.51	57.04	1.92	1.95	2.05	2.04	104.16	106.96	115.85	116.65	0.80	0.69	9.69	9.06
United States	22.87	23.48	23.63	23.63	2.29	2.30	2.53	2.53	52.42	54.07	59.78	59.78	0.00	0.00	5.71	10.57
Total Foreign	31.40	31.29	32.89	33.42	1.65	1.69	1.71	1.70	51.74	52.90	56.07	56.87	0.80	1.42	3.98	7.51
Major Exporters																
Brazil	15.29	15.70	16.88	16.88	2.96	2.02	2.06	2.09	28.55	31.70	34.80	35.30	0.50	1.44	3.60	11.36
Argentina	9.65	10.00	10.80	10.80	1.63	1.92	1.97	2.02	15.75	19.20	21.30	21.80	0.50	2.35	2.60	13.54
Paraguay	4.75	4.80	5.10	5.10	2.42	2.33	2.29	2.29	11.50	11.20	11.70	11.70	0.00	0.00	0.50	4.46
	0.89	0.90	0.98	0.98	1.46	1.44	1.84	1.84	1.30	1.30	1.80	1.80	0.00	0.00	0.50	38.46
Other Foreign																
China	16.11	15.59	16.01	16.54	1.44	1.36	1.33	1.30	23.19	21.20	21.27	21.57	0.30	1.40	0.38	1.77
Canada	7.56	7.05	7.20	7.20	1.46	1.38	1.35	1.35	11.00	9.71	9.70	9.70	0.00	0.00	-0.01	-0.10
Eastern Europe	0.48	0.60	0.56	0.56	2.61	2.44	2.48	2.48	1.26	1.46	1.39	1.39	0.00	0.00	-0.07	-5.00
EC-12	0.34	0.23	0.25	0.25	1.06	1.83	1.26	1.26	0.36	0.42	0.32	0.32	0.00	0.00	-0.11	-25.53
India	0.66	0.48	0.43	0.43	3.11	3.13	3.06	3.06	2.07	1.51	1.32	1.31	-0.00	-0.08	-0.19	-12.86
Indonesia	2.56	2.82	3.20	3.67	1.01	0.81	0.92	0.85	2.60	2.28	2.95	3.11	0.16	5.39	0.83	36.66
FSU-12	1.28	1.33	1.40	1.40	1.10	1.13	1.13	1.13	1.40	1.50	1.58	1.58	0.00	0.00	0.07	5.00
Mexico	0.83	0.81	0.83	0.83	1.06	1.14	1.14	1.14	0.88	0.92	0.94	0.94	0.00	0.00	0.02	2.17
Thailand	0.28	0.34	0.24	0.31	2.05	2.11	1.70	1.85	0.57	0.72	0.40	0.58	0.18	44.50	-0.14	-19.50
Korea, DPR	0.41	0.33	0.34	0.34	1.30	1.27	1.18	1.18	0.53	0.42	0.40	0.40	0.00	0.00	-0.02	-5.21
Japan	0.34	0.34	0.34	0.34	1.29	1.29	1.18	1.18	0.44	0.44	0.40	0.40	0.00	0.00	-0.04	-9.09
Bolivia	0.15	0.14	0.11	0.11	1.51	1.40	1.71	1.71	0.22	0.20	0.19	0.19	0.00	0.00	-0.01	-4.57
Rep. of Korea	0.19	0.20	0.21	0.21	1.89	1.90	1.90	1.90	0.35	0.38	0.40	0.40	0.00	0.00	0.02	5.26
Colombia	0.15	0.12	0.11	0.11	1.53	1.54	1.68	1.68	0.23	0.18	0.18	0.18	0.00	0.00	-0.01	-3.83
Others	0.10	0.04	0.04	0.04	1.82	1.76	1.88	1.88	0.19	0.07	0.08	0.08	0.00	0.00	0.00	1.35
	0.78	0.75	0.76	0.74	1.39	1.31	1.38	1.36	1.09	0.99	1.05	1.01	-0.04	-3.61	0.03	2.84

TABLE 13
Cottonseed Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	33.03	34.75	32.43	32.55	1.01	1.06	0.98	0.97	33.49	36.72	31.73	31.67	-0.05	-0.17	-5.05	-13.75
United States	4.75	5.25	4.51	4.51	1.14	1.20	1.26	1.28	5.42	6.28	5.68	5.79	0.11	1.94	-0.49	-7.78
Total Foreign	28.28	29.51	27.92	28.04	0.99	1.03	0.93	0.92	28.08	30.44	26.04	25.88	-0.16	-0.63	-4.56	-14.99
China	5.59	6.54	6.75	6.75	1.37	1.48	1.14	1.14	7.67	9.66	7.73	7.70	-0.03	-0.38	-1.96	-20.33
FSU-12	3.17	3.01	2.85	2.89	1.54	1.47	1.33	1.29	4.88	4.44	3.80	3.72	-0.08	-2.11	-0.71	-16.12
Pakistan	2.66	2.88	2.46	2.67	1.23	1.51	1.26	1.16	3.28	4.36	3.09	3.09	0.00	0.00	-1.26	-29.00
India	7.44	7.70	7.42	7.44	0.52	0.53	0.60	0.60	3.90	4.11	4.44	4.44	0.00	0.00	0.34	8.18
Brazil	1.92	1.95	1.63	1.52	0.61	0.61	0.64	0.61	1.17	1.19	1.05	0.93	-0.12	-11.43	-0.26	-21.85
Turkey	0.64	0.60	0.63	0.63	1.61	1.47	1.50	1.50	1.03	0.88	0.95	0.95	0.00	0.00	0.07	7.63
African Franc Zone	1.17	1.21	1.20	1.20	0.76	0.74	0.77	0.77	0.89	0.89	0.92	0.93	0.01	0.76	0.04	4.04
Australia	0.28	0.28	0.25	0.25	2.47	2.66	2.07	2.07	0.69	0.75	0.52	0.52	0.00	0.00	-0.23	-30.71
Egypt	0.42	0.36	0.35	0.35	1.37	1.42	1.36	1.36	0.57	0.51	0.48	0.48	0.00	0.00	-0.03	-5.88
Argentina	0.63	0.58	0.40	0.40	0.78	0.84	0.80	0.80	0.49	0.49	0.32	0.32	0.00	0.00	-0.16	-34.02
Paraguay	0.55	0.48	0.35	0.38	0.78	0.53	0.80	0.93	0.43	0.26	0.28	0.35	0.07	25.00	0.09	37.25
Greece	0.27	0.24	0.30	0.28	1.18	1.34	1.16	1.27	0.31	0.32	0.35	0.35	0.00	0.00	0.03	9.37
Syria	0.16	0.17	0.17	0.17	1.86	2.08	2.08	2.08	0.29	0.35	0.36	0.36	0.00	0.00	0.01	1.69
Mexico	0.19	0.25	0.04	0.04	1.83	1.18	1.79	1.79	0.34	0.29	0.08	0.08	0.00	0.00	-0.22	-74.49
Colombia	0.26	0.28	0.12	0.12	1.10	1.02	1.04	1.04	0.29	0.28	0.12	0.12	0.00	0.00	-0.16	-57.14
Sudan	0.18	0.20	0.20	0.20	1.07	0.96	1.00	1.00	0.19	0.19	0.20	0.20	0.00	0.00	0.01	5.26
Others	2.77	2.80	2.79	2.76	0.60	0.53	0.49	0.49	1.67	1.49	1.36	1.35	-0.01	-0.81	-0.14	-9.13

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TABLE 14
Peanut Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	MMT	Percent	MMT	Percent
World	19.40	19.81	19.49	19.37	1.14	1.12	1.13	1.15	22.21	22.18	22.09	22.36	0.27	1.24	0.19	0.84
United States	0.73	0.82	0.68	0.68	2.23	2.74	2.87	2.87	1.63	2.24	1.94	1.94	0.00	0.00	-0.29	-13.06
Total Foreign	18.66	18.99	18.81	18.69	1.10	1.05	1.07	1.09	20.57	19.94	20.15	20.42	0.27	1.35	0.48	2.40
India	8.31	8.67	8.50	8.39	0.90	0.82	0.98	1.03	7.51	7.10	8.30	8.60	0.30	3.61	1.50	21.13
China	2.91	2.88	2.95	2.95	2.19	2.19	1.80	1.80	6.37	6.30	5.30	5.30	0.00	0.00	-1.00	-15.87
Indonesia	0.60	0.62	0.64	0.64	1.43	1.45	1.45	1.45	0.86	0.89	0.93	0.93	0.00	0.00	0.04	4.49
Senegal	0.91	0.87	0.88	0.88	0.77	0.83	0.82	0.82	0.70	0.72	0.73	0.73	0.00	0.00	0.00	0.14
Burma	0.55	0.54	0.49	0.49	0.86	0.81	0.86	0.86	0.47	0.44	0.42	0.42	0.00	0.00	-0.02	-4.55
Argentina	0.22	0.16	0.09	0.09	2.61	2.50	2.50	2.50	0.57	0.40	0.23	0.23	0.00	0.00	-0.18	-43.75
Sudan	0.54	0.53	0.55	0.55	0.60	0.75	0.71	0.71	0.33	0.40	0.39	0.39	0.00	0.00	-0.01	-2.50
Zaire	0.53	0.53	0.53	0.53	0.72	0.72	0.72	0.72	0.38	0.38	0.38	0.38	0.00	0.00	0.00	0.00
Nigeria	0.50	0.48	0.50	0.50	0.50	0.46	0.50	0.50	0.25	0.22	0.25	0.25	0.00	0.00	0.03	13.64
Vietnam	0.30	0.30	0.30	0.30	0.98	0.98	0.98	0.98	0.30	0.30	0.30	0.30	0.00	0.00	0.00	0.00
Rep. of South Africa	0.09	0.20	0.16	0.16	1.30	0.57	1.10	1.10	0.11	0.12	0.18	0.18	0.00	0.00	0.06	55.17
Brazil	0.10	0.10	0.09	0.09	1.65	1.68	1.69	1.69	0.16	0.16	0.15	0.15	0.00	0.00	-0.02	-9.38
Thailand	0.12	0.12	0.12	0.12	1.33	1.31	1.32	1.32	0.16	0.16	0.16	0.16	0.00	0.00	0.00	1.25
Burkina Faso	0.22	0.23	0.23	0.23	0.68	0.69	0.69	0.69	0.15	0.16	0.16	0.16	0.00	0.00	0.00	0.00
Central African Rep.	0.13	0.13	0.13	0.13	1.08	1.12	1.12	1.12	0.14	0.15	0.15	0.15	0.00	0.00	0.00	0.00
Cameroon	0.32	0.32	0.32	0.32	0.44	0.44	0.44	0.44	0.14	0.14	0.14	0.14	0.00	0.00	0.00	0.00
Cote d' Ivoire	0.15	0.15	0.15	0.15	0.97	0.97	0.98	0.98	0.15	0.15	0.15	0.15	0.00	0.00	0.00	1.35
Gambia	0.08	0.10	0.10	0.10	0.94	1.26	1.26	1.26	0.08	0.12	0.12	0.12	0.00	0.00	0.00	0.00
Uganda	0.14	0.14	0.14	0.14	0.79	0.79	0.79	0.79	0.11	0.11	0.11	0.11	0.00	0.00	0.00	0.00
Others	1.96	1.93	1.95	1.95	0.84	0.80	0.83	0.82	1.64	1.54	1.63	1.60	-0.03	-1.66	0.06	3.90

TABLE 15
Sunflowerseed Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production				
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year		
	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	MMT	Percent	MMT	Percent	
World	16.36	17.11	17.21	17.28	1.40	1.25	1.25	1.24	1.24	22.85	21.42	21.56	21.35	-0.21	-1.00	-0.07	-0.32
United States	0.75	1.08	0.84	0.84	1.38	1.51	1.41	1.41	1.41	1.03	1.64	1.18	1.18	0.00	0.00	-0.46	-27.94
Total Foreign	15.61	16.02	16.37	16.44	1.40	1.23	1.24	1.23	1.23	21.82	19.78	20.38	20.17	-0.21	-1.05	0.39	1.97
FSU-12	4.67	4.50	4.60	4.77	1.41	1.25	1.20	1.15	1.15	6.56	5.64	5.53	5.49	-0.04	-0.67	-0.15	-2.61
Argentina	2.30	2.80	2.40	2.35	1.83	1.36	1.46	1.45	1.45	4.20	3.80	3.50	3.40	-0.10	-2.86	-0.40	-10.53
EC-12	2.61	2.35	2.60	2.62	1.64	1.69	1.60	1.59	1.59	4.26	3.97	4.16	4.16	0.01	0.14	0.19	4.73
France	1.14	1.03	1.01	1.01	2.12	2.47	2.31	2.31	2.31	2.42	2.54	2.33	2.33	0.00	0.00	-0.21	-8.27
Spain	1.20	1.07	1.37	1.37	1.08	0.84	1.00	1.00	1.00	1.30	0.90	1.36	1.36	0.00	0.00	0.46	51.11
Italy	0.17	0.15	0.09	0.09	2.33	2.38	2.22	2.22	2.22	0.40	0.35	0.20	0.20	0.00	0.00	-0.15	-42.53
Eastern Europe	1.23	1.34	1.53	1.53	1.71	1.68	1.58	1.58	1.58	2.10	2.26	2.42	2.42	0.00	0.00	0.16	7.27
Hungary	0.35	0.35	0.35	0.35	1.95	2.00	2.00	2.00	2.00	0.67	0.70	0.70	0.70	0.00	0.00	0.00	0.00
Romania	0.40	0.48	0.57	0.57	1.41	1.28	1.19	1.19	1.19	0.56	0.61	0.68	0.68	0.00	0.00	0.07	11.11
Yugoslavia	0.21	0.19	0.18	0.18	1.97	2.00	1.81	1.81	1.81	0.42	0.38	0.33	0.33	0.00	0.00	-0.05	-14.47
Bulgaria	0.24	0.27	0.38	0.38	1.57	1.61	1.58	1.58	1.58	0.37	0.43	0.60	0.60	0.00	0.00	0.17	38.25
Czechoslovakia	0.03	0.06	0.05	0.05	2.32	2.32	2.30	2.30	2.30	0.08	0.13	0.12	0.12	0.00	0.00	-0.02	-11.54
China	0.71	0.75	0.73	0.73	1.88	1.47	1.45	1.45	1.45	1.34	1.10	1.05	1.05	0.00	0.00	-0.05	-4.55
Turkey	0.70	0.55	0.70	0.70	1.23	1.18	1.40	1.40	1.40	0.86	0.65	0.98	0.98	0.00	0.00	0.33	50.77
India	1.63	2.10	2.20	2.20	0.53	0.56	0.59	0.59	0.59	0.87	1.18	1.30	1.30	0.00	0.00	0.12	10.17
Rep. of South Africa	0.58	0.45	0.40	0.40	1.02	0.38	1.00	1.00	1.00	0.59	0.17	0.40	0.40	0.00	0.00	0.23	131.21
Australia	0.17	0.09	0.14	0.07	0.90	1.02	0.94	0.81	0.81	0.15	0.09	0.13	0.06	-0.08	-58.33	-0.03	-38.89
Burma	0.15	0.18	0.17	0.17	0.64	0.60	0.64	0.64	0.64	0.10	0.11	0.11	0.11	0.00	0.00	0.00	2.83
Others	0.88	0.92	0.91	0.91	0.89	0.88	0.89	0.88	0.88	0.78	0.81	0.80	0.80	-0.01	-0.87	-0.01	-1.36

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TABLE 16
Rapeseed Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area					Yield					Production					Change in Production			
	Prel.					Prel.					Prel.					From last month		From last year	
	1990/91	1991/92	Apr	May	1992/93 Proj.	1990/91	1991/92	Apr	May	1992/93 Proj.	1990/91	1991/92	Apr	May	Million metric tons	MMT	Percent	MMT	Percent
World	18.27	20.59	20.18	19.87		1.38	1.38	1.32	1.32		25.21	28.35	26.57	26.26		-0.31	-1.17	-2.09	-7.39
United States	0.03	0.07	0.06	0.06		1.74	1.42	1.55	1.55		0.05	0.09	0.09	0.09		0.00	0.00	-0.01	-9.57
Total Foreign	18.24	20.52	20.12	19.81		1.38	1.38	1.32	1.32		25.16	28.26	26.49	26.17		-0.31	-1.18	-2.09	-7.38
India	5.78	6.47	6.60	6.29		0.90	0.90	0.91	0.90		5.23	5.84	6.00	5.66		-0.34	-5.65	-0.18	-3.08
China	5.50	6.10	6.05	6.05		1.26	1.22	1.26	1.26		6.96	7.44	7.65	7.65		0.00	0.00	0.21	2.88
Canada	2.53	3.14	2.90	2.90		1.29	1.34	1.27	1.27		3.27	4.22	3.69	3.69		0.00	0.00	-0.54	-12.67
EC-12	2.13	2.43	2.32	2.32		2.88	3.02	2.68	2.68		6.15	7.34	6.21	6.21		0.00	0.00	-1.13	-15.39
France	0.69	0.72	0.68	0.68		2.80	3.11	2.75	2.75		1.94	2.23	1.86	1.86		0.00	0.00	-0.37	-16.41
Germany	0.72	0.95	1.00	1.00		2.90	3.13	2.59	2.59		2.09	2.97	2.59	2.59		0.00	0.00	-0.38	-12.88
United Kingdom	0.39	0.44	0.42	0.42		3.08	2.96	3.00	3.00		1.20	1.30	1.26	1.26		0.00	0.00	-0.04	-3.08
Denmark	0.27	0.28	0.18	0.18		2.94	2.59	2.22	2.22		0.79	0.73	0.40	0.40		0.00	0.00	-0.33	-44.90
Eastern Europe	0.74	0.71	0.63	0.63		2.39	2.29	2.00	2.00		1.76	1.62	1.26	1.26		0.00	0.00	-0.37	-22.72
Poland	0.50	0.47	0.42	0.42		2.41	2.23	1.88	1.88		1.21	1.04	0.79	0.79		0.00	0.00	-0.26	-24.74
Czechoslovakia	0.14	0.17	0.15	0.15		2.77	2.70	2.52	2.52		0.38	0.45	0.38	0.38		0.00	0.00	-0.07	-15.73
FSU-12	0.44	0.49	0.48	0.48		1.12	1.10	0.81	0.81		0.49	0.53	0.39	0.39		0.00	0.00	-0.14	-26.97
Sweden	0.16	0.15	0.13	0.13		2.25	1.74	1.94	1.94		0.37	0.25	0.25	0.25		0.00	0.00	-0.01	-1.98
Pakistan	0.30	0.32	0.32	0.32		0.75	0.69	0.76	0.76		0.23	0.22	0.24	0.24		0.00	0.00	0.02	10.96
Bangladesh	0.35	0.35	0.35	0.35		0.66	0.66	0.66	0.66		0.23	0.23	0.23	0.23		0.00	0.00	0.00	0.00
Finland	0.07	0.06	0.07	0.07		1.91	1.72	1.80	1.80		0.12	0.11	0.12	0.12		0.00	0.00	0.01	13.33
Others	0.24	0.31	0.28	0.28		1.51	1.46	1.64	1.72		0.36	0.45	0.45	0.48		0.03	5.97	0.03	5.74

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TABLE 17
Copra, Palm Kernel, and Palm Oil Production
World and Selected Countries and Regions

Country/Region	Production				Change in Production			
	Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Apr	May				
	Million metric tons				MMT	Percent	MMT	Percent
<u>COPRA</u>								
World	4.76	4.82	4.84	4.89	0.05	1.03	0.07	1.51
Philippines	2.01	1.97	2.02	2.02	0.00	0.00	0.05	2.54
Indonesia	1.31	1.38	1.39	1.39	0.00	0.00	0.01	1.09
India	0.40	0.45	0.45	0.45	0.00	0.00	0.00	0.00
Mexico	0.13	0.19	0.15	0.20	0.05	34.48	0.01	2.63
Sri Lanka	0.13	0.06	0.08	0.08	0.00	0.00	0.02	31.15
Vietnam	0.13	0.13	0.13	0.13	0.00	0.00	0.00	0.00
Malaysia	0.08	0.08	0.07	0.07	0.00	0.00	-0.01	-9.76
Others	0.58	0.57	0.56	0.56	0.00	0.00	-0.01	-1.41
<u>PALM KERNEL</u>								
World	3.32	3.41	3.63	3.63	0.00	0.00	0.22	6.43
Malaysia	1.77	1.81	1.93	1.93	0.00	0.00	0.12	6.81
Indonesia	0.66	0.66	0.71	0.71	0.00	0.00	0.04	6.82
Nigeria	0.26	0.27	0.28	0.28	0.00	0.00	0.01	3.70
Cote d' Ivoire	0.06	0.06	0.06	0.06	0.00	0.00	0.00	3.57
Colombia	0.05	0.07	0.07	0.07	0.00	0.00	0.00	2.86
Thailand	0.04	0.05	0.05	0.05	0.00	0.00	0.00	0.00
Zaire	0.03	0.03	0.03	0.03	0.00	0.00	0.00	0.00
Ecuador	0.02	0.02	0.02	0.02	0.00	0.00	0.00	0.00
Others	0.43	0.44	0.48	0.48	0.00	0.00	0.04	8.33
<u>PALM OIL</u>								
World	11.09	11.49	12.35	12.36	0.01	0.06	0.87	7.56
Malaysia	6.03	6.22	6.65	6.65	0.00	0.00	0.43	6.88
Indonesia	2.65	2.75	3.15	3.15	0.00	0.00	0.40	14.55
Nigeria	0.60	0.63	0.60	0.60	0.00	0.00	-0.03	-4.76
Cote d' Ivoire	0.28	0.28	0.29	0.29	0.00	0.00	0.00	1.42
Colombia	0.25	0.30	0.32	0.32	0.00	0.00	0.03	8.81
Thailand	0.20	0.22	0.24	0.24	0.00	0.00	0.02	7.73
Zaire	0.12	0.11	0.11	0.11	0.00	0.00	0.00	0.00
Ecuador	0.12	0.14	0.13	0.14	0.01	6.06	0.00	1.45
Others	0.84	0.85	0.87	0.87	0.00	0.00	0.02	2.60

May 1993

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 18
Cotton Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change In Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From Last Month		From Last Year	
	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	1990/91	1991/92	Apr	May	MBales	Percent	MBales	Percent
	Million hectares				Kilograms per hectare				Million 480 lb. bales				MBales	Percent	MBales	Percent
World	33.07	34.75	32.42	32.57	573	601	560	552	86.98	95.97	83.35	82.54	-0.81	-0.98	-13.43	-13.99
United States	4.75	5.25	4.51	4.51	711	731	782	783	15.51	17.61	16.20	16.22	0.02	0.09	-1.40	-7.93
Total Foreign	28.32	29.50	27.90	28.06	549	578	524	515	71.48	78.35	67.15	66.32	-0.83	-1.24	-12.03	-15.36
<i>Major Exporters</i>																
China	17.28	18.11	17.00	17.21	695	742	650	633	55.13	61.74	50.71	50.06	-0.65	-1.28	-11.68	-18.92
Pakistan	5.59	6.54	6.75	6.75	807	869	671	671	20.70	26.10	20.80	20.80	0.00	0.00	-5.30	-20.31
Sudan	2.66	2.88	2.46	2.67	615	756	628	580	7.52	10.00	7.10	7.10	0.00	0.00	-2.90	-29.00
Turkey	0.20	0.19	0.19	0.19	422	494	463	463	0.38	0.42	0.40	0.40	0.00	0.00	-0.02	-4.76
Turkmenistan	0.64	0.60	0.63	0.63	1021	937	957	957	3.01	2.58	2.78	2.78	0.00	0.00	0.20	7.91
Other	3.17	3.01	2.85	2.89	818	814	733	709	11.91	11.25	9.60	9.40	-0.20	-2.08	-1.85	-16.44
Egypt	1.83	1.72	1.67	1.67	871	860	787	784	7.32	6.79	6.02	6.00	-0.02	-0.35	-0.79	-11.63
African Franc Zone	0.62	0.60	0.57	0.57	701	710	679	684	2.01	1.97	1.78	1.79	0.01	0.67	-0.18	-9.18
Southern Hemisphere	0.72	0.69	0.62	0.65	784	790	638	538	2.59	2.49	1.80	1.61	-0.19	-10.61	-0.88	-35.32
Argentina	0.42	0.36	0.35	0.35	719	814	987	987	1.38	1.34	1.60	1.60	0.00	0.00	0.26	19.58
Australia	1.17	1.23	1.18	1.18	457	438	466	475	2.46	2.47	2.53	2.58	0.05	1.98	0.11	4.33
Brazil	3.44	3.31	2.58	2.55	493	499	498	462	7.78	7.59	5.90	5.40	-0.50	-8.47	-2.18	-28.81
Paraguay	0.63	0.58	0.40	0.40	468	431	435	381	1.36	1.15	0.80	0.70	-0.10	-12.50	-0.45	-39.02
Major Importers																
India	0.28	0.28	0.25	0.25	1552	1770	1388	1388	1.99	2.29	1.60	1.60	0.00	0.00	-0.69	-30.19
Others	1.98	1.97	1.58	1.52	354	381	358	315	3.22	3.45	2.60	2.20	-0.40	-15.38	-1.24	-36.14
	0.55	0.48	0.35	0.38	482	318	560	523	1.22	0.70	0.90	0.90	0.00	0.00	0.20	28.57
	0.48	0.44	0.49	0.45	731	825	797	795	1.62	1.66	1.79	1.63	-0.16	-8.97	-0.02	-1.39
	10.56	10.96	10.41	10.41	304	297	306	306	14.72	14.95	14.64	14.63	-0.02	-0.13	-0.33	-2.18
	7.44	7.70	7.42	7.44	267	267	299	299	9.14	9.43	10.20	10.20	0.00	0.00	0.77	8.17
	3.12	3.26	2.99	2.97	390	369	323	325	5.58	5.52	4.44	4.43	-0.02	-0.43	-1.10	-19.85

TABLE 19

The table below presents a 12-year record of the difference between the May projections and the final estimates. Using world wheat production as an example changes between the May projection and the final estimate have averaged 14.1 million tons (2.7 percent) and ranged from -25.1 to 20.6 million tons. The May projection has been below the final 7 times and above the final 5 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1992/93 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million metric tons---				Number of years 2/
WHEAT						
World	2.7	14.1	–25.1	20.6	7	5
U.S.	4.7	2.8	–5.2	9.8	6	6
Foreign	2.7	12.1	–23.9	20.0	7	5
COARSE GRAINS 3/						
World	3.3	25.4	–31.9	75.3	6	6
U.S.	12.5	23.8	–30.2	70.3	6	6
Foreign	2.2	12.0	–21.2	28.1	3	9
RICE (Milled)						
World	2.8	8.8	–21.8	11.4	8	4
U.S.	6.2	0.3	–1.0	1.0	7	5
Foreign	2.8	8.8	–22.0	11.2	8	4
SOYBEANS						
World	N/A	N/A	N/A	N/A	N/A	N/A
U.S.	8.5	4.2	–7.7	12.0	7	5
Foreign	N/A	N/A	N/A	N/A	N/A	N/A
		---Million 480-lb. bales---				
COTTON						
World	5.3	4.4	–13.7	10.6	8	4
U.S.	10.2	1.3	–2.8	1.8	6	6
Foreign	4.9	3.4	–12.2	9.6	7	5
UNITED STATES		-----Million bushels-----				
CORN	13.1	797	–990	2,379	5	7
SORGHUM	16.4	122	–228	171	7	5
BARLEY	12.4	50	–73	206	7	5
OATS	20.2	63	–77	231	4	8

1/ The final estimate for 1981/82-1991/92 is defined as the first November estimate following the marketing year.

2/ May not total 12 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

MAY 11, 1993



5 - SOUTH AFRICA

Timely April showers improve winter wheat planting prospects in the southern Cape Province. In the east, early month showers help emerging wheat but scattered frost delays development. Dryness since mid-April aids mature corn.

6 - SOUTH ASIA

Warmer, drier weather, initially beneficial for winter crop drydown, has been intensifying over India and Pakistan since mid-April, stressing livestock and newly planted cotton. Recent showers in eastern rice areas boost irrigation for planting but cause some flooding.

7 - EASTERN ASIA

Recent rains benefit vegetative winter wheat and topsoils for summer crops across the North China Plain. Continued widespread showers favor irrigation supplies across central and southern China.

8 - SOUTHEAST ASIA

Continuing unseasonable showers in early April improve planting prospects for Thailand's rainfed rice and corn. However, hotter, drier weather the past few weeks is reducing available moisture. Unseasonably heavy rain over Java improves dry season rice prospects but causes some flooding.

9 - AUSTRALIA

Continued dry weather across eastern Australia limits pasture growth and subsoil moisture reserves for winter wheat. Western and southern wheat areas have adequate moisture reserves for wheat planting.

10 - NORTHWESTERN AFRICA

Rain in late April over Morocco brings little relief to maturing winter grains, stressed by drought during the growing season.

3 - EUROPE

Spring rain promotes winter grain growth in western Europe, but the moisture is too little and too late in Spain. Warm, dry weather in the northeast reduces topsoil moisture for vegetative growth.

4 - FORMER USSR

In April, cold, wet weather slows growth of winter grains and delays spring crop planting in the west. Topsoil moisture is abundant for upcoming spring grain planting in the New Lands. Recent warm, dry weather favors fieldwork over most of the region.

1 - UNITED STATES

Fieldwork, planting, pasture growth and winter wheat development are slowed by a combination of wet soils and cool temperatures. Flooding interrupts barge traffic on the Mississippi River system.

2 - SOUTH AMERICA

Periodic showers delay soybean and corn harvesting across central Argentina, but favor subsoil moisture for winter wheat. Favorable harvest weather continues across southern Brazil. In northeastern Brazil, recent rains aid crops stressed from previous dryness.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

EUROPE: IBERIAN PENINSULA BENEFITS FROM RAIN

Showers were more frequent in occurrence and moderate to heavy in amounts across the Iberian Peninsula during April 12 through May 11, 1993. Until this time, much of Portugal and Spain was suffering from severe dryness, a condition continuing from the 1992 growing season. Rainfall amounts of 25 to 50 mm per week fell across northwest Spain and most of Portugal. Interior and southern Spain however, did not receive significant rainfall until April 25. Since then, moderate and beneficial rain has fallen across the region. The recent moisture came too late to benefit winter grains in Spain, which have advanced beyond the growth stages where moisture could provide significant recovery. This rainfall did increase top soil moisture for recently planted summer crops, provided moisture for temporary relief to pastures, and provided some improvement in irrigation reserves, which were very low. Reservoir levels were only about 30 percent of normal before the rainfall.

ARGENTINA: HEAVY RAINFALL DELAYS HARVEST

Rainfall was moderate-to-heavy across northeast Argentina during the period of April 12 through May 11, 1993. Buenos Aires and the major soybean growing region of southern Santa Fe Province received the bulk of the rainfall with weekly amounts varying from 50 to 200 mm. This moisture caused delays in summer crop harvesting and the related flooding damaged some of the corn and sunflowers. Rainfall during March and early April 1993 was below normal across this region, leaving top soils somewhat depleted of moisture. Pre-planting moisture was favorable across the winter grain growing areas, where planting usually begins during mid-May.

CHINA: RAINFALL BENEFITS WINTER GRAINS

Seasonally moderate rainfall occurred across central China from April 12 through May 11, 1993. Periodic showers fell from April 11 through 17 and again from April 25 through May 1, benefitting winter grains across the Yangtze Basin. Rainfall from April 25 through May 1 totaled 10 to 60 mm, with isolated amounts greater than 100 mm, across the southern and central North China Plain. This moisture benefitted vegetative-to-reproductive winter grains. Clear and dry weather during the remainder of the period favored summer crop planting. Elsewhere, rainfall was moderate-to-heavy across southern China during this period. Weekly amounts exceeded 100 mm causing flooding in Guangdong Province.

AUSTRALIA: PINEAPPLE SITUATION

Pineapple production in Australia is forecast to increase 6 percent in 1993, to 165,000 tons, according to the U.S. agricultural counselor in Canberra. If realized, this would be the largest crop since the record output of 168,300 tons in 1988. Favorable weather is expected to increase yields 16 percent, more than enough to offset a 9 percent decline in area harvested. Harvested area reached record levels in 1992 as farmers responded to a combination of favorable prices and drought-induced yield reductions.

Australia: Pineapple Area, Yield, and Production

Year	Area Planted (Hectares)	Area Harvested (Hectares)	Yield (Metric tons)	Production (Metric tons)
1988	5,618	4,300	39.14	168,300
1989	4,935	3,800	38.42	146,000
1990	6,458	4,521	31.41	142,000
1991	5,922	3,820	38.00	145,166
1992	5,740	5,032	31.00	156,000
1993 <u>1/</u>	5,900	4,583	36.00	165,000

1/ Preliminary.

BRAZIL: CHANGES IN AGRICULTURAL POLICY

The Government of Brazil announced a new plan of action for economic development in the road maintenance, housing, and agricultural sectors, according to the U.S. agricultural counselor in Brasilia. For agriculture, the plan calls for investment of nearly US\$5.0 billion. The funds are designed to increase agricultural production for the domestic and foreign markets, with an emphasis on basic food stuffs. In addition, the programs should increase rural employment. Monies are earmarked for the following programs: US\$0.70 billion for marketing the 1992/93 crops; US\$0.25 billion for purchasing and marketing the 1992/93 winter crops (mainly wheat); US\$0.86 billion for the coffee sector; US\$1.00 billion for the sugarcane sector; US\$1.40 billion for rural infrastructure; US\$0.30 billion for equalizing interest rates for rice, dry beans, corn, and manioc; and, US\$0.20 billion for refinancing rural insurance debt.

Reaction to the economic program was cautiously optimistic. According to farmers' organizations, it should bring several long-term benefits to farmers, especially sugarcane growers. In the short-term, harvest expenses will be moderated by the increases in the guaranteed minimum prices for corn, rice, and dry beans as well as the financing to cover the difference between the market price and the guaranteed minimum price. Many farmers have been selling their products for as much as 30 percent below the minimum support price. The US\$0.25 billion announced for the 1992/93 wheat crop probably will not reverse the downturn in area planted to wheat because of stiff competition from cheap imported wheat, mainly from Argentina.

CANADA: STATISTICS CANADA FORECASTS 1993/94 PLANTED AREA

According to Statistics Canada's first farmer survey for 1993, wheat area during the 1993/94 season is forecast to decline 9 percent from last year's area. The forecast for all other crops are higher than in 1992/93, with the largest gain in rapeseed area. However, summerfallow is forecast to decline 1 percent from last season. Over the past 10 years, Statistics Canada's wheat area forecast has been within 2 percent of the final seeded area.

Canada: Crop Area Forecasts

Year	Wheat	Barley	Corn	Oats	Rapeseed	Soybeans
	----- Million hectares -----					
1991/92 <u>1/</u>	14.16	4.23	1.11	0.84	3.14	0.60
1992/93 <u>1/</u>	13.83	3.79	1.05	1.24	2.90	0.56
1993/94 <u>2/</u>	13.14	4.58	1.09	1.35	3.72	0.71

1/ USDA estimated harvested area.

2/ Statistics Canada planted area forecast.

EUROPEAN COMMUNITY: TOBACCO PRICE SUPPORT SYSTEM CHANGED

The European Community (EC) modified the Common Agricultural Policy for tobacco on June 30, 1992, so the new system would be applicable for the 1993 season. The revised rules are expected to cause a sharp reduction in EC tobacco production. The major rules are as follows: (1) A fixed quota for each type of tobacco produced in each member country. For example, the 1993 flue-cured tobacco quota for Italy is 47,600 tons. Any flue-cured production over quota will not be eligible for subsidies (premiums). In past years, subsidies were paid for over-quota production; (2) In order to be paid the subsidy, the producer must have a cultivation contract with the processor confirming that the tobacco was grown in an area specifically set aside for the type of tobacco to be delivered; (3) Import quotas, intervention support purchases, and export subsidy payments will be eliminated under most circumstances.

The combined tobacco quota for 1993 is 370,000 tons, significantly below the EC's 1992 production level of approximately 452,000 tons. In Italy, the largest tobacco producer in the EC, plantings for the 1993 crop are forecast to decline 18 percent. In Greece, the EC's second largest producer, 1993 plantings are expected to be down 12 to 13 percent. The Greek planting estimate would be lower, but the Government is expected to ask the EC to grant a larger 1993 quota for flue-cured tobacco. As indicated by the following table, most EC countries plan to keep production at or below their quota level.

Tobacco: Guarantee Thresholds - 1993

Country	<u>Production 1/</u> 1992	<u>Quota 1/</u> 1993	<u>Production 1/</u> 1993 forecast
Italy	162,000	145,100	143,000
Greece	206,000	133,950	174,500
Spain	45,612	42,300	42,300
France	23,314	28,050	28,050
Germany	8,330	12,000	9,000
Portugal	5,290	6,700	6,023
Belgium	1,600	1,900	1,500

1/ Metric Tons - Farm sales weight.

FORMER SOVIET UNION: WEATHER AND CROP DEVELOPMENTS

In winter grain areas of the former Soviet Union, autumn planting conditions were unfavorable. In Russia, continuous rains in North Caucasus delayed planting beyond the optimum planting month of September. On the other hand, September dryness caused planting delays in Ukraine. Although the delayed planting caused winter grains to enter dormancy with minimal establishment, the fifth consecutive warmer-than-normal winter allowed dormant crops to reach spring in good condition. Winterkill is believed to be less than the average of 10 to 13 percent.

In April, unseasonably warm, dry weather prevailed during the first week, but a period of wet, cold weather occurred from April 7 through April 23. The cold weather delayed winter grain greening in the north and slowed vegetative growth in the south. Although the cold, wet weather halted spring grain planting, it increased soil moisture, especially in Ukraine, North Caucasus, and Volga Valley. These areas received twice the normal monthly amount of rain. In Estonia, Latvia, and Lithuania, April precipitation was below normal, allowing spring grain planting. By the end of April, winter grains had broken dormancy over major growing areas and were jointing in southern Ukraine and North Caucasus. Since April 24, unseasonably warm, dry weather helped to stimulate further vegetative growth in winter grains and allowed fieldwork for spring grain planting to advance northward.

In spring grain areas east of the Volga Valley, planting usually begins around mid-May. Near-to-above-normal precipitation since last September has provided favorable soil moisture conditions for emergence and early establishment.

NEW ZEALAND: KIWIFRUIT SITUATION

New Zealand's 1993 kiwifruit crop is forecast at 226,500 tons, down 17 percent from 1992, according to the U.S. agricultural attache in Wellington. The decline is the result of poor pollination weather, frost and hail damage in the Auckland region, and a reduction in harvested area. Export production is estimated at 201,600 tons (56.0 million 3.6-kilogram trays), down 16 percent from 1992.

The Kiwifruit Marketing Board (KMB) is attempting to reduce production to achieve an optimal export crop level of 180,000 tons (50.0 million 3.6-kilogram trays). To accomplish this, the KMB is encouraging marginal producers to leave the industry by paying for vine removal. Thus far, 650 hectares have been uprooted which represents about 9,720 tons of export production out of a target volume of 36,000 tons. Those exiting the industry have been paid, on average, US\$3,500 per hectare of uprooted vines.

New Zealand: Kiwifruit Area, Yield, and Production

Year	Area Harvested (Hectares)	Export Yield (Tons/Hectare)	Total Yield (Tons/Hectare)	Export Production (Metric tons)	Total Production (Metric tons)
1989	15,895	10.91	11.92	173,400	189,500
1990	15,744	16.50	18.59	259,700	292,700
1991	14,980	14.37	17.31	215,200	259,300
1992	14,500	16.63	18.90	241,200	274,100
1993 <u>1/</u>	13,850	14.56	16.35	201,600	226,500

1/ Preliminary.

SPAIN: TABLE OLIVE SITUATION

The U.S. agricultural counselor in Madrid reports that Spain's 1993 table olive crop is expected to be less than 200,000 tons because of unusually dry weather. Although approximately 50 percent of Spain's olive crop is irrigated, since April 1, 1993, irrigation has officially been banned in Andalusia where 76 percent of the table olive acreage is located. The area planted to table olive trees is estimated at 196,000 hectares, of which 90 to 95 percent is bearing.

The 1992 Spanish table olive crop is estimated at 247,000 tons, 7 percent higher than in 1991, but 6 percent below the previous 5-year average. Although 1992 was expected to be a peak year in the bearing cycle for table olives, drought reduced output.

UGANDA: COTTON INDUSTRY IN TRANSITION

Uganda has begun taking steps to revitalize its cotton industry, which has suffered from mismanagement and neglect since the 1970's. Once Uganda's main export, cotton production has dropped from a peak of 397,000 bales in 1969/70 to an estimated 33,000 bales in 1992/93. This amount is significantly lower than the 42,500 bales needed by the domestic textile industry.

As part of a western-backed economic recovery program, the Ugandan Government introduced reforms in 1990 to lift cotton price controls, partially liberalize cotton trade, and end the purchasing monopoly of the state-controlled Lint Marketing Board (LMB). However, these reforms have caused new problems for the farmers they were intended to help. A shortage of private buyers has caused cotton prices to fall to an all-time low of \$US0.10 per kilogram, down from \$US0.28 per kilogram last year. Without the income from guaranteed sales to the LMB, farmers have said they will not have enough money to plant cotton this year. The LMB has also found it hard to obtain enough cottonseed to distribute to farmers, since it is no longer the country's sole cotton buyer. Despite these problems, the Uganda Government plans to continue its reform effort.

United States: Crop Progress and Winter Wheat Conditions

April conditions were mostly wet and cool. The wet conditions delayed field work, while the cool temperatures hindered development of winter planted crops. By the end of the month, drier and warmer conditions allowed producers to start their spring planting and allowed increased development of winter crops. Rain during the first week of May fell across the central part of the Nation, severely limiting field work in the central Corn Belt. Much of the rest of the country experienced drier conditions, which allowed producers to fertilize and start planting their fields.

The U.S. National Agricultural Statistics Service released the following crop progress and winter wheat conditions report for the week ending May 9.

U.S. CROP PROGRESS
PERCENT PLANTED

	<u>1993</u>	<u>1992</u>	<u>AVERAGE</u>
SOYBEANS	2	18	12
CORN	18	67	59
COTTON	36	57	45
SORGHUM	28	37	NA
RICE	38	83	63

U.S. WINTER WHEAT CONDITIONS

PERCENT

	<u>1991</u>	<u>1992</u>
EXCELLENT	17	6
GOOD	61	37
FAIR	20	41
POOR	2	11
VERY POOR	0	5

FEATURE COMMODITY ARTICLES

WORLD CENTRIFUGAL SUGAR PRODUCTION

The preliminary forecast for 1993/94 world centrifugal sugar production is 114.2 million tons (raw value), 1 percent above 1992/93, but 1 percent below the record outturn of 115.9 million tons in 1991/92. The 1992/93 forecast has been revised to 112.9 million tons, down from the March 1993 forecast of 114.4 million (WAP 3-93). Lower production estimates for Thailand, India, Brazil, China, and Cuba outweighed higher estimates for Ukraine, Turkey, Australia, and Mexico.

The 1993/94 forecast for sugar produced from sugarcane is 75.5 million tons, up 2 percent from last year. Sugar from sugarbeets is forecast at 38.8 million tons, about the same as last season.

In Asia, the world's largest sugar producing region, preliminary assessments indicate sugar outturn will increase 3 percent in 1993/94, to 35.2 million tons. In the European Community, 1993/94 production is forecast at 15.8 million tons, down 7 percent from last season. In contrast, sugar output in Eastern Europe and the Former Soviet Union (FSU-12) is expected to increase 13 and 9 percent, respectively, to 3.9 and 7.5 million tons.

Sugar output in India, the world's largest producer, is forecast at nearly 14.0 million tons for 1993/94, up 6 percent from the revised 1992/93 estimate, but 9 percent below the record 15.3 million tons produced in 1991/92. The upturn projected for 1993/94 hinges on policy changes designed to improve the financial condition of the mills. The revised sugar production estimate for 1992/93 is 13.2 million tons, down 14 percent from 1991/92. The downturn was due to a reduction in planted area and to lower yields caused by dry weather in Maharashtra and Uttar Pradesh.

Indian sugar policy is based on 1) minimum prices which the mills are required to pay farmers for cane; and, 2) government sugar purchases from mills -- at below market prices -

- for distribution through ration shops. The Government controls the movement of ration shop sugar and tells the mills when the remaining sugar can be sold. However, the mills are allowed to set prices for non-rationed sugar. Recently, the Government raised its purchase price for mill sugar by 15 percent and reduced the percentage of sugar that mills must sell to the Government from 45 to 40 percent. These steps were taken to increase the financial viability of the mills and to provide a higher support price for sugarcane growers.

Brazilian sugar production for 1993/94 is forecast at 9.4 million tons, up 2 percent from last season, mainly due to a small increase in planted area. Brazil's 1992/93 sugar outturn of 9.2 million tons was 3 percent larger than the 1991/92 volume primarily because of an increase in harvested area.

Rainfall in the Center-South region during the past 6 months has been beneficial to the development of the cane crop in that region. However, the sugarcane crop to be harvested starting in September 1993 in the North/Northeastern region has been stressed due to insufficient precipitation since February.

Brazil's industrial production capacity remains unchanged at 12.0 million tons of sugar and approximately 15.0 million cubic meters (4.0 billion gallons) of ethanol. The monthly average inflation rate of 25 percent, high prices for field inputs, and late monthly adjustments to sugarcane and sugar prices to offset the high inflation rate precipitated a decline in field inputs. Sugarcane prices for growers, millers, and refiners are adjusted monthly by the Brazilian Government in order to offset value corrosion resulting from the high rate of inflation. Although government price adjustments are not always punctual and the rate of the price adjustments may not always be at a level sufficient to offset the rate of inflation, there has been no indication that cane growers or millers will reduce cane plantings or

sugar production in the foreseeable future. However, domestic consumption of ethanol as a motor fuel could have a long-term effect on sugar production. The sugar production forecast is uncertain, in part, because of the role of the ethanol industry which utilizes 60 to 65 percent of Brazil's sugarcane. Changes in the demand for automotive fuel or in the supply of imported methanol, used to supplement ethanol fuel, can rebound on the availability of sugarcane for the production of sugar.

In China, the sugar production forecast for 1993/94 is 7.6 million tons, down 9 percent from 1992/93, due to projections of smaller harvested areas for both beets and cane. China is estimated to have produced 8.3 million tons of sugar in 1992/93, down from the March forecast of 8.6 million and moderately below the 1991/92 record of 8.5 million.

China's sugar industry is concentrated in the southern (cane) and northern (beet) provinces. Guangdong and Heilongjiang have long ranked as China's leading cane and beet producers, although Guangxi pushed ahead of Guangdong during the 1992/93 season. China's efforts to expand sugar production in the more remote provinces of Xinjiang, Guangxi, and Yunnan began in 1988 and appear successful. Xinjiang recorded a 24-percent increase in beet production during 1992/93, while sugar output in Guangxi rose from 800,000 tons in 1985/86 to an estimated 2.1 million in 1992/93.

Provision of subsidized inputs to farmers is declining in the major sugar producing provinces. The long-standing practice of providing cane farmers with Government subsidized supplies of chemical fertilizers was eliminated in Guangdong several years ago. Guangxi eliminated the practice beginning with the 1992/93 crop season. Local Governments and mills may provide such inputs in some areas, but this practice is rapidly disappearing.

The production costs for raising cane and/or beets is about the same as for other crops. Profitability of the crop is the determining factor. Grains and soybeans compete with beets in the Northeast, while vegetables, rice, cassava, and fruits compete with cane in the

South. Many sugarbeet producers in Heilongjiang have shifted to more profitable, less labor intensive crops such as rice, soybeans, and corn in order to boost profits.

Thailand's 1993/94 sugar production forecast of 4.4 million tons is up 14 percent from 1992/93. The 1992/93 estimate has been revised to 3.8 million tons, down from the March 1993 estimate of 4.8 million and 25 percent below 1991/92 because drought early in the growing season affected sugarcane yields more than was previously anticipated.

For the past several years, sugarcane area has been expanding in the lower-North and Northeast regions as many farmers switched from cassava, corn, and soybeans to cane when mills were relocated to these regions. Current regulations now prohibit the relocation of mills as well as the expansion of crushing capacity because the Government is attempting to limit sugar production and protect forest reserve land from encroachment.

In Ukraine, sugar production for 1993/94 is forecast at 4.4 million tons, up 14 percent from the poor outturn of 3.8 million in 1992/93. Sugarbeet area is expected to be down slightly from last year, but a substantial increase in yield is anticipated.

Russia's 1993/94 sugar output is expected to remain unchanged at the 1992/93 level of 2.6 million tons. In contrast, Russia's 1992/93 sugar production of 2.6 million tons exceeded the 1991/92 level by 30 percent, primarily due to expanded area. However, traditional problems such as input shortages and poor field management practices, will continue to adversely affect sugar output in both Russia and Ukraine.

Germany and France are each projecting a 1993/94 sugar production level of 4.3 million tons, down 2 and 9 percent, respectively. In Germany, the decline reflects a 2-percent reduction in beet area. In France, beet area and yield are expected to be down 4 percent. French sugarbeet producers are concerned that several companies in France and other EC countries have announced plans to produce

fructose syrup from chicory. Currently, fructose derived from this source is not subject to EC production quotas.

In Australia, sugar production for 1993/94 is forecast at 4.2 million tons, down 4 percent from 1992/93. Although acreage is up 7 percent, cane yield is reportedly down 5 percent. Australia's sugar outturn in 1992/93 is estimated at a record 4.4 million tons from a record 29.3 million tons of cane harvested.

The Australian sugar industry is undergoing a major long-term expansion. Since 1989, established growers have had the opportunity to expand their land assignments and new growers have entered the industry. The dry conditions experienced during the 1991/92 season retarded the expected growth in area planted and adversely affected area expansion during the 1992/93 season. However, the long-term expansion trend is expected to prevail with Australian sugar production topping 5.0 million tons by the year 2000.

Mexico's 1993/94 sugar production forecast is 3.9 million tons, down 4 percent from the 1992/93 record of 4.0 million, due to a slight decrease in harvested area and a 5-percent reduction in cane yield. Mexico's cane area is expected to remain relatively stable, given current government policies. In the longer term, the sugar industry plans to increase sugar production primarily via higher yields in the field and improved recovery rates in the factories.

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TABLE 20
WORLD CENTRIFUGAL SUGAR PRODUCTION 1/
(1,000 Metric tons)

	1990/91	1991/92	1992/93	1993/94 2/
NORTH AMERICA				
Canada	138	160	118	125
Mexico	3,900	3,500	4,000	3,850
United States 3/ 4/	6,263	6,558	6,949	6,895
Total	10,301	10,218	11,067	10,870
SOUTH AMERICA				
Argentina	1,300	1,550	1,350	1,230
Bolivia	230	300	270	270
Brazil	7,900	8,936	9,210	9,400
Chile	370	360	528	515
Colombia	1,595	1,765	1,805	1,850
Ecuador	355	348	383	400
Guyana	162	253	245	260
Paraguay	89	110	110	110
Peru	575	456	490	600
Surinam	1	1	1	1
Uruguay	70	80	70	70
Venezuela	510	549	525	510
Total	13,157	14,708	14,987	15,216
CENTRAL AMERICA				
Belize	104	102	104	105
Costa Rica	265	302	295	320
El Salvador	270	346	336	330
Guatemala	1,015	1,118	1,100	1,120
Honduras	191	188	191	190
Nicaragua	217	194	185	200
Panama	126	127	120	125
Total	2,188	2,377	2,331	2,390
CARIBBEAN				
Barbados	65	55	48	55
Cuba	7,620	7,000	5,800	6,000
Dominican Republic	580	568	610	610
Guadeloupe	60	41	65	70
Haiti	30	30	30	30
Jamaica	221	223	235	240
Martinique	2	4	5	6
Puerto Rico	67	61	64	65
St. Kitts and Nevis	15	20	20	20
Trinidad and Tobago	104	114	105	120
Total	8,764	8,116	6,982	7,216
EC-12				
Belgium-Luxembourg	1,116	966	980	990
Denmark	591	508	447	500
France 5/	4,736	4,413	4,738	4,300
Germany	4,675	4,250	4,400	4,300
Greece	315	310	354	350
Ireland	227	232	242	220
Italy	1,587	1,640	1,870	1,660
Netherlands	1,341	1,137	1,251	1,100
Portugal	2	1	2	4
Spain	1,036	938	1,037	1,000
United Kingdom	1,360	1,330	1,590	1,350
Total	16,986	15,725	16,911	15,774
OTHER WESTERN EUROPE				
Austria	451	466	437	500
Finland	176	162	159	180
Sweden	419	252	317	380
Switzerland	160	136	150	150
Total	1,206	1,016	1,063	1,210

FOOTNOTES AT END OF TABLE

MAY 1993

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 20 (Continued)

**WORLD CENTRIFUGAL SUGAR PRODUCTION 1/
(1,000 Metric tons)**

	1990/91	1991/92	1992/93	1993/94 2/
EASTERN EUROPE				
Albania	14	15	10	10
Bulgaria	80	60	35	40
Czechoslovakia 9/	810	793	750	650
Hungary	550	700	360	450
Poland	2,214	1,640	1,567	1,850
Romania	334	450	300	420
Yugoslavia 10/	885	850	450	520
Total	4,887	4,508	3,472	3,940
FSU-12 6/	8,546	6,601	6,848	7,475
Baltics 7/	117	125	95	110
NORTH AFRICA				
Algeria	10	10	10	10
Egypt	982	950	1,008	1,040
Morocco	519	499	454	510
Sudan	480	500	500	500
Tunisia	37	27	40	40
Total	2,028	1,986	2,012	2,100
SUB-SAHARAN AFRICA				
Angola	35	35	35	35
Benin	5	5	5	5
Burkina	20	20	20	20
Burundi	14	10	16	15
Cameroon	60	60	60	60
Chad	20	20	20	20
Congo (Brazzaville)	35	35	35	35
Cote d' Ivorie	149	165	170	170
Ethiopia	190	200	200	200
Gabon	20	20	20	20
Ghana	5	5	5	5
Guinea	25	25	25	25
Kenya	430	434	372	350
Madagascar	118	96	125	125
Malawi	200	200	200	200
Mali	20	20	20	20
Mauritius	661	648	681	680
Mozambique	35	40	30	30
Nigeria	59	45	50	50
Reunion	200	225	237	245
Rwanda	5	5	5	5
Senegal	60	60	60	60
Sierra Leone	6	7	6	6
Somalia	40	40	30	30
South Africa	2,152	2,429	1,602	1,500
Swaziland	527	521	525	530
Tanzania	112	115	115	115
Togo	5	5	5	5
Uganda	30	30	30	30
Zaire	60	60	60	60
Zambia	133	140	140	140
Zimbabwe	493	328	8	30
Total	5,924	6,048	4,912	4,821
MIDDLE EAST				
Iran	700	750	850	900
Iraq	8	10	12	12
Lebanon	6	6	8	8
Syria	43	59	99	70
Turkey	1,944	2,052	2,120	2,150
Total	2,701	2,877	3,089	3,140

FOOTNOTES AT END OF TABLE

MAY 1993

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 20 (Continued)
WORLD CENTRIFUGAL SUGAR PRODUCTION 1/
(1,000 Metric tons)

	1990/91	1991/92	1992/93	1993/94 2/
OTHER ASIA				
Afghanistan	10	10	10	10
Bangladesh	262	240	240	240
Burma	25	30	30	30
China	6,765	8,492	8,300	7,550
India 8/	13,748	15,250	13,170	13,950
Indonesia	2,120	2,250	2,300	2,400
Japan	922	987	895	900
Malaysia	95	104	105	105
Nepal	40	45	45	45
Pakistan	2,067	2,489	2,430	2,730
Philippines	1,718	2,010	1,875	1,850
Sri Lanka	35	65	65	60
Taiwan	409	510	435	470
Thailand	3,954	5,062	3,800	4,350
Vietnam	500	600	550	550
Total	32,670	38,144	34,250	35,240
OCEANIA				
Australia	3,637	3,014	4,367	4,200
Fiji	420	400	465	450
Papua New Guinea	45	50	50	50
Total	4,102	3,464	4,882	4,700
WORLD TOTAL	113,577	115,913	112,901	114,202

1/ One-half of the crop years are on a September/August basis. Crop years for Southern Hemisphere countries begin prior to September. Factors for converting from refined to raw sugar are 1.087 for refined beet sugar and 1.07 for refined cane sugar.

2/ Forecast.

3/ Preliminary.

4/ United States data include continental beet and cane and Hawaii cane sugar, but exclude Puerto Rico cane sugar which is listed separately.

5/ French data exclude production of cane sugar in Guadeloupe, Martinique, and Reunion which are listed separately.

6/ FSU-12 includes the 12 newly independent states of the former USSR.

7/ Includes Estonia, Latvia, and Lithuania.

8/ Indian data include production of Khandsari sugar, a native type, semi-white centrifugal sugar. Estimated output of Khandsari sugar in thousands of tons is as follows: 1990/91 - 859; 1991/92 - 840; 1992/93 - 869; 1993/94 - 770.

9/ Includes the Czech Republic and Slovakia.

10/ Includes all 6 republics of the former Yugoslavia.

MAY 1993

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 21

CENTRIFUGAL SUGAR PRODUCTION IN THE FSU-12 AND BALTIC STATES
(1,000 Metric tons – Raw value)

	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94 1/
Armenia	15	18	0	0	0	0
Belarus	171	176	175	130	110	130
Georgia	5	2	4	3	3	5
Kazakhstan	145	105	96	70	125	160
Kyrgyzstan	0	0	0	1	10	30
Moldova	243	285	309	222	200	200
Russia	3,186	3,212	2,593	1,997	2,600	2,600
Ukraine	4,989	5,627	5,369	4,178	3,800	4,350
Total FSU-12	8,754	9,425	8,546	6,601	6,848	7,475
Latvia	35	42	34	35	35	35
Lithuania	124	93	83	90	60	75
Total Baltics	159	135	117	125	95	110

1/ Preliminary.

Source: FSU-12 data, attache reports, and analyst research.

May 1993

Production Estimates and Crop Assessment Division FAS, USDA

TABLE 22

SUGARBEET AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	BEET YIELD	SUGARBEET PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Austria						
1991/92	51	49.5	2,522	466	18.5	9.14
1992/93	54	48.2	2,605	437	16.8	8.09
1993/94 MAY	53	52.8	2,800	500	17.9	9.43
Belgium-Luxembourg						
1991/92	106	57.0	6,043	966	16.0	9.11
1992/93	105	58.8	6,174	980	15.9	9.33
1993/94 MAY	105	61.9	6,500	990	15.2	9.43
China 3/						
1991/92	784	20.8	16,289	1,815	11.1	2.32
1992/93	700	21.4	15,010	1,650	11.0	2.36
1993/94 MAY	650	21.5	14,000	1,550	11.1	2.38
Czechoslovakia 2/						
1991/92	165	32.6	5,375	793	14.8	4.81
1992/93	163	31.7	5,160	750	14.5	4.60
1993/94 MAY	135	35.2	4,750	650	13.7	4.81
Denmark						
1991/92	65	49.8	3,235	508	15.7	7.82
1992/93	65	48.3	3,141	447	14.2	6.88
1993/94 MAY	65	49.2	3,200	500	15.6	7.69
France						
1991/92	455	53.6	24,403	4,413	18.1	9.70
1992/93	457	57.1	26,100	4,738	18.2	10.37
1993/94 MAY	437	54.7	23,900	4,300	18.0	9.84
Germany						
1991/92	574	45.2	25,926	4,250	16.4	7.40
1992/93	554	49.1	27,177	4,400	16.2	7.94
1993/94 MAY	542	49.1	26,600	4,300	16.2	7.93
Hungary						
1991/92	115	43.5	5,000	700	14.0	6.09
1992/93	97	36.1	3,500	360	10.3	3.71
1993/94 MAY	97	36.1	3,500	450	12.9	4.64
Italy						
1991/92	274	41.6	11,400	1,640	14.4	5.99
1992/93	290	50.0	14,500	1,870	12.9	6.45
1993/94 MAY	245	47.3	11,600	1,660	14.3	6.78
Japan 3/						
1991/92	72	57.2	4,115	780	19.0	10.83
1992/93	71	50.4	3,581	680	19.0	9.58
1993/94 MAY	70	54.3	3,800	700	18.4	10.00
Netherlands						
1991/92	123	58.5	7,200	1,137	15.8	9.24
1992/93	121	68.2	8,251	1,251	15.2	10.34
1993/94 MAY	118	59.3	7,000	1,100	15.7	9.32
Poland						
1991/92	361	31.6	11,412	1,640	14.4	4.54
1992/93	376	29.4	11,052	1,567	14.2	4.17
1993/94 MAY	435	32.2	14,000	1,850	13.2	4.25

FOOTNOTES AT END OF TABLE

MAY 1993

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 22 (Continued)

SUGARBEET AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	BEET YIELD	SUGARBEET PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Romania						
1991/92	202	22.4	4,528	450	9.9	2.23
1992/93	180	15.4	2,777	300	10.8	1.67
1993/94 MAY	205	19.8	4,050	420	10.4	2.05
Spain 3/						
1991/92	150	44.5	6,679	923	13.8	6.15
1992/93	150	49.4	7,408	1,022	13.8	6.81
1993/94 MAY	150	49.3	7,400	985	13.3	6.57
Turkey						
1991/92	400	38.7	15,474	2,052	13.3	5.13
1992/93	398	38.9	15,500	2,120	13.7	5.33
1993/94 MAY	412	38.3	15,800	2,150	13.6	5.22
FSU-12 4/						
1991/92	3,120	20.7	64,612	6,601	10.2	2.12
1992/93	3,138	19.4	61,030	6,848	11.2	2.18
1993/94 MAY	3,187	22.6	72,150	7,475	10.4	2.35
Baltics 5/						
1991/92	42	28.3	1,189	125	10.5	2.98
1992/93	51	21.6	1,100	95	8.6	1.86
1993/94 MAY	50	23.0	1,150	110	9.6	2.20
United Kingdom 3/						
1991/92	170	45.1	7,672	1,330	17.3	7.82
1992/93	170	54.0	9,180	1,590	17.3	9.35
1993/94 MAY	170	45.0	7,650	1,350	17.6	7.94
United States 3/						
1991/92	562	45.3	25,485	3,480	13.7	6.19
1992/93	571	45.8	26,170	3,901	14.9	6.83
1993/94 MAY	578	45.5	26,308	3,810	14.5	6.59
Yugoslavia 6/						
1991/92	140	44.9	6,290	850	13.5	6.07
1992/93	121	30.1	3,640	450	12.4	3.72
1993/94 MAY	105	38.1	4,000	520	13.0	4.95
MAJOR BEET PRODUCERS						
1991/92	7,931	32.1	254,849	34,919	13.7	4.40
1992/93	7,832	32.3	253,056	35,456	14.0	4.53
1993/94 MAY	7,809	33.3	260,158	35,370	13.6	4.53
OTHERS						
1991/92	604	39.0	23,534	2,998	12.7	4.96
1992/93	632	38.7	24,475	3,307	13.5	5.23
1993/94 MAY	643	38.8	24,980	3,450	13.8	5.37
WORLD						
1991/92	8,535	32.6	278,383	37,917	13.6	4.44
1992/93	8,464	32.8	277,531	38,763	14.0	4.58
1993/94 MAY	8,452	33.7	285,138	38,820	13.6	4.59

1/ Refined beet sugar is converted to raw value by a forecast of 1.087.

2/ Includes the Czech Republic and Slovakia.

3/ Produces cane sugar as well as beet sugar.

4/ FSU-12 includes the 12 newly independent states of the former USSR.

5/ Includes Estonia, Latvia, and Lithuania.

6/ Includes all 6 republics of the former Yugoslavia.

TABLE 23

SUGARBEET PRODUCTION IN THE FSU-12 AND BALTIC STATES
(1,000 Metric tons)

	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94 1/
Armenia	117	117	0	0	0	0
Belarus	1,579	1,810	1,479	1,160	1,100	1,300
Georgia	51	39	34	18	30	50
Kazakhstan	1,321	1,188	1,134	723	1,300	1,500
Kyrgyzstan	0	0	0	10	100	300
Moldova	2,270	3,612	2,374	2,253	2,000	2,000
Russia	32,825	37,378	31,091	24,280	25,500	30,000
Ukraine	48,205	51,917	44,265	36,168	31,000	37,000
Total FSU-12	86,368	96,061	80,377	64,612	61,030	72,150
Latvia	455	395	439	378	400	400
Lithuania	1212	1075	912	811	700	750
Total Baltics	1,667	1,470	1,351	1,189	1,100	1,150

1/ Preliminary.

Source: FSU-12 data, attache reports, and analyst research.

May 1993

Production Estimates and Crop Assessment Division FAS, USDA

TABLE 24

SUGARCANE AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	CANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Argentina						
1991/92	280	51.1	14,320	1,550	10.8	5.54
1992/93	260	50.4	13,100	1,350	10.3	5.19
1993/94 MAY	240	52.9	12,700	1,230	9.7	5.13
Australia						
1991/92	341	62.5	21,306	3,014	14.1	8.84
1992/93	339	86.1	29,200	4,367	15.0	12.88
1993/94 MAY	363	82.1	29,800	4,200	14.1	11.57
Brazil						
1991/92	1,220	71.3	87,000	8,936	10.3	7.32
1992/93	1,500	60.0	90,000	9,210	10.2	6.14
1993/94 MAY	1,500	60.7	91,000	9,400	10.3	6.27
China 2/						
1991/92	1,164	58.3	67,898	6,677	9.8	5.74
1992/93	1,200	57.1	68,500	6,650	9.7	5.54
1993/94 MAY	1,075	57.7	62,000	6,000	9.7	5.58
Colombia						
1991/92	118	116.6	13,763	1,765	12.8	14.96
1992/93	122	120.5	14,700	1,805	12.3	14.80
1993/94 MAY	126	119.0	15,000	1,850	12.3	14.68
Cuba						
1991/92	1,200	45.0	54,000	7,000	13.0	5.83
1992/93	1,200	45.0	54,000	5,800	10.7	4.83
1993/94 MAY	1,200	45.0	54,000	6,000	11.1	5.00
Dominican Republic						
1991/92	207	32.1	6,644	568	8.5	2.74
1992/93	215	31.2	6,700	610	9.1	2.84
1993/94 MAY	215	32.1	6,900	610	8.8	2.84
Egypt 2/						
1991/92	90	88.1	7,929	860	10.8	9.56
1992/93	91	92.9	8,450	916	10.8	10.07
1993/94 MAY	92	94.0	8,650	940	10.9	10.22
Fiji						
1991/92	60	56.3	3,380	400	11.8	6.67
1992/93	60	67.0	4,020	465	11.6	7.75
1993/94 MAY	60	67.0	4,020	450	11.2	7.50
Guatemala						
1991/92	125	82.1	10,258	1,118	10.9	8.94
1992/93	126	81.0	10,200	1,100	10.8	8.73
1993/94 MAY	126	81.3	10,250	1,120	10.9	8.89

FOOTNOTES AT END OF TABLE

MAY 1993

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 24 (Continued)

SUGARCANE AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	CANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
India 3/						
1991/92	2,200	67.6	148,814	15,250	10.2	6.93
1992/93	2,250	55.6	125,078	13,170	10.5	5.85
1993/94 MAY	2,250	60.2	135,500	13,950	10.3	6.20
Indonesia						
1991/92	385	73.0	28,100	2,250	8.0	5.84
1992/93	400	73.0	29,200	2,300	7.9	5.75
1993/94 MAY	415	73.5	30,500	2,400	7.9	5.78
Mauritius						
1991/92	80	80.0	6,400	648	10.1	8.10
1992/93	80	72.3	5,781	681	11.8	8.51
1993/94 MAY	80	81.3	6,500	680	10.5	8.50
Mexico						
1991/92	519	68.0	35,300	3,500	9.9	6.74
1992/93	530	71.7	38,000	4,000	10.5	7.55
1993/94 MAY	525	68.0	35,700	3,850	10.8	7.33
Pakistan 2/						
1991/92	583	42.5	24,796	2,457	9.9	4.21
1992/93	640	43.2	27,650	2,400	8.7	3.75
1993/94 MAY	671	43.2	29,000	2,700	9.3	4.02
Peru						
1991/92	44	102.4	4,507	456	10.1	10.36
1992/93	42	111.9	4,700	490	10.4	11.67
1993/94 MAY	45	122.2	5,500	600	10.9	13.33
Philippines						
1991/92	371	61.5	22,816	2,010	8.8	5.42
1992/93	370	56.8	21,000	1,875	8.9	5.07
1993/94 MAY	355	57.7	20,500	1,850	9.0	5.21
South Africa						
1991/92	276	72.7	20,078	2,429	12.1	8.80
1992/93	275	47.1	12,958	1,602	12.4	5.83
1993/94 MAY	270	45.4	12,250	1,500	12.2	5.56
Sudan						
1991/92	50	100.0	5,000	500	10.0	10.00
1992/93	50	100.0	5,000	500	10.0	10.00
1993/94 MAY	50	100.0	5,000	500	10.0	10.00
Swaziland						
1991/92	37	106.5	3,941	521	13.2	14.08
1992/93	36	106.9	3,850	525	13.6	14.58
1993/94 MAY	36	106.9	3,850	530	13.8	14.72

FOOTNOTES AT END OF TABLE

MAY 1993

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 24 (Continued)

SUGARCANE AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	CANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Taiwan						
1991/92	58	92.9	5,387	510	9.5	8.79
1992/93	58	73.9	4,289	435	10.1	7.50
1993/94 MAY	58	82.8	4,800	470	9.8	8.10
Thailand						
1991/92	940	50.5	47,505	5,062	10.7	5.39
1992/93	900	38.9	35,000	3,800	10.9	4.22
1993/94 MAY	900	44.4	40,000	4,350	10.9	4.83
U.S. (Hawaii) 4/						
1991/92	27	196.8	5,313	625	11.8	23.15
1992/93	23	202.3	4,654	580	12.5	25.22
1993/94 MAY	22	209.0	4,599	562	12.2	25.55
U.S. (Mainland) 2/						
1991/92	317	66.1	20,959	2,453	11.7	7.74
1992/93	330	64.9	21,420	2,468	11.5	7.48
1993/94 MAY	334	65	21,700	2,522	11.6	7.55
Venezuela						
1991/92	109	64.5	7,031	549	7.8	5.04
1992/93	105	61.9	6,500	525	8.1	5.00
1993/94 MAY	100	60.0	6,000	510	8.5	5.10
Zimbabwe						
1991/92	26	74.1	1,927	328	17.0	12.62
1992/93	11	8.3	91	8	8.8	0.73
1993/94 MAY	11	27.3	300	30	10.0	2.73
Major Cane Producers						
1991/92	10,827	62.3	674,372	71,436	10.6	6.60
1992/93	11,213	57.4	644,041	67,632	10.5	6.03
1993/94 MAY	11,119	59.0	656,019	68,804	10.5	6.19
OTHERS						
1991/92	1,259	57.7	72,694	6,685	9.2	5.31
1992/93	1,285	55.7	71,584	6,601	9.2	5.14
1993/94 MAY	1,302	56.4	73,469	6,687	9.1	5.14
WORLD						
1991/92	12,086	61.8	747,066	78,121	10.5	6.46
1992/93	12,498	57.3	715,625	74,233	10.4	5.94
1993/94 MAY	12,421	58.7	729,488	75,491	10.3	6.08

1/ Refined cane sugar is converted to raw value by a factor of 1.07.

2/ Produces beet sugar as well as cane sugar.

3/ Includes Khandsari (native type semi-white centrifugal sugar).

4/ Hawaiian cane is harvested once every 24 months. Consequently, yields per hectare are much higher than in countries where cane is harvested every year.

MAY 1993

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

WORLD COTTON PRODUCTION OUTLOOK FOR 1993/94

Important factors influencing world cotton production include the current cotton market situation, domestic and world financial conditions, government policies, and weather. This season's lower world cotton price, which is associated with a relatively high ratio of ending stocks to use, is a significant factor influencing 1993/94 cotton output.

Preliminary indications are that world cotton production for 1993/94 could increase to 87.5 million bales, well above this year's drought and pest effected crop. The 1992/93 crop is estimated at 82.5 million bales. Harvest area is forecast to fall slightly compared to this year, with higher yields pushing output above the 1992/93 level. Foreign production is forecast at 70.0 million bales, 3.7 million above 1992/93. Foreign harvested area is estimated at 27.0 million hectares. The forecast implies that government policies in several large producing countries will support increased production in the face of lower cotton prices. The forecast considers the effect of this season's lower prices but bars catastrophic losses due to weather, insects, diseases, and financial problems.

China: A strong government-supported cotton procurement price, combined with subsidized production inputs, has prompted expansion in planted area that began in 1990/91. This emphasis should diminish for 1993/94 as the lower world price and large China cotton stocks alter its production policies. Along with government policy to trim cotton production by reducing area, farmers have become somewhat disenchanted with cotton. For 1993/94, cotton area is expected to fall well below the estimated 6.8 million hectares for 1992/93. However, production should increase from last year's reduced level of 20.8 million bales as yields rebound from the early drought and insect infestation of 1992/93.

China's cultural practice of intercropping wheat with cotton allows a large population of crop pests, such as boll worms, to over-winter. This allows the pests to gain a foothold and reduces the effectiveness of pesticides. In 1992/93, production dropped well below expectations as a nearly uncontrollable boll worm infestation

destroyed a large portion of the crop in the North China Plain. This situation is not expected to affect China's current production policy of reducing cotton output.

United States: Production for 1993/94 is forecast at 17.5 million bales, well above this year's estimated output of 16.2 million. Harvested area for 1993/94 is forecast at 5.0 million hectares. This area is 0.5 million hectares above the weather reduced level of 1992/93 when extensive areas in Texas were abandoned as cool temperatures, rain, and hail damaged the crop. As of May 9, cotton plantings in 1993 are behind last year with 36 percent completed, compared with 57 percent in 1992 and behind the average of 45 percent. Planting progress in Texas is equal to last year. However, many producers in Texas are waiting for warmer ground temperatures before continuing to plant. More moisture is needed for cotton in the Texas Low Plains. Wind damage occurred in some cotton fields in Arizona and Texas.

FSU: Cotton production for 1993/94 is forecast to increase from the reduced level of 9.4 million bales in 1992/93. A return to normal yields is forecast to more than offset area declines. The area for 1993/94 is expected to fall about 5 percent below this year's estimated area of 2.9 million hectares, reflecting a continuing shift to food and forage crops. There are 2 opposing forces that could affect the size of the cotton area. Each newly independent State wants to maintain or expand area to earn hard currency. On the other hand, they also want to provide more food production to feed a growing population. The pressure to reduce cotton plantings comes from the States' desire to increase the area dedicated to food and forage crop production. Besides their food concerns, the Republics have experienced an increase in land salinity from cotton production. The salinity problem discourages using more land for cotton.

Mexico: Indications are that production for 1993/94 likely will be near this year's low output of 138,000 bales. Acceptable government price supports and adequate financing have failed to develop for producers this season. The Government's price support program targeted the

areas of Mexicali, Sonora, and Tamaulipas, where 75 percent of the cotton is grown. The new program specifies a producer payment of 800 new pesos, or about US\$250 per hectare. The U.S. agricultural counselor in Mexico City estimates the cost of production in Sonora, the largest producer of the 3 areas, at \$1,430 dollars per hectare. Given a cotton selling price of 53 cents per pound and an average yield of 4.5 bales (480-pound bales) per hectare, farmers would gross slightly less than the production cost. This includes the governmental support of \$250. During the planting season, banks were unwilling to extend credit to producers because of farmers' large debts and the low world price for cotton. This situation does not bode well for increased production for 1993/94.

Brazil: Production in the largest of the 3 major cotton producing countries in South America is expected to be up from the 2.2 million bales produced in 1992/93. This projection is based upon area and price increases for most of Brazil's Center-South Region. The increase in this region is expected to more than offset a slight decrease in area in the Northeast. The Center-South's 1992/93 crop suffered a significant area decrease over the previous crop due to producer dissatisfaction with cotton prices. Because of lower prices, farmers switched area into soybeans. Currently, Center-South producer prices are the highest in 5 seasons. If these prices hold, they are expected to encourage increased cotton plantings this September. However, planting intentions also will depend on the Brazilian Government's rural credit and minimum price policies.

Argentina: Cotton farmers, especially those in the Provinces of Chaco and Formosa, have had a series of problems to cope with in 1992/93 besides being financially weakened from last year's low returns. The 1992/93 crop, estimated at 0.7 million bales, was affected by cold weather during the sowing period as well as heavy rains and flooding during the December-January period. The weather turned favorable since February and improved the potential of this year's crop. Because the crop matured unevenly, the final output of the 1992/93 crop is hard to determine but is seen as an indicator that could affect the size of the 1993/94 cotton area. Production for 1993/94 likely will be down reflecting the hardship of the past 2 years.

Nevertheless, cotton has remained the best choice in recent years in the states of Chaco and Formosa, the main cotton producing areas.

Paraguay: Cotton production in 1993/94 may rebound as the introduction of new high-yielding varieties from the United States has performed well this year. These new varieties allow for higher plant density per unit of area that adds to its yield potential. This year's area did not reach expected levels because of low government support levels, high production costs, and discouragement from the poor output of the 1991/92 crop. Because of the new varieties, output for 1992/93 should reach approximately 900,000 bales, well above 1991/92 production. With the performance of the new varieties and with the boll weevil threat from Brazil diminished, cotton area in Paraguay will likely stabilize around 400,000 hectares in 1993. This will end 2 successive years of area declines. However, low international prices may hold cotton expansion to a small gain.

Pakistan: Cotton plantings for 1993/94 have begun in the Sindh region of Pakistan but are about a month away for the Punjab. The Punjab region accounts for 90 percent of the cotton output. Area intentions for the 1993/94 season are being influenced by this year's lower world cotton prices. However, the Government is expected to implement agricultural policies designed to keep land in production because cotton and the associated textile industry are vital to Pakistan's economy and balance of trade. The 1992/93 cotton crop, estimated at 7.1 million bales, suffered from one of the most severe floods on record, reducing harvested area. Further, the inability of producers to complete timely pesticide spraying and a widespread occurrence of leaf curl virus (LCV) reduced yields and lint output.

Preliminary expectations are for an improved 1993/94 crop as farmers try to recoup from this year's harvest losses and guard against another pest and virus infected crop. Farmers will likely plant new LCV resistant varieties in 1993/94 and practice new plant management techniques learned from this past year's experience. Production is forecast to be well above the 7.1 million bales produced in 1992/93.

India: Cotton production in 1993/94 is expected

to be near this season's excellent crop, which is estimated at 10.2 million bales. Currently, good soil moisture prevails in the rain-fed areas of the cotton producing regions. Generally, favorable soil moisture conditions at this stage of the year, followed by a normal summer monsoon, results in a larger cotton area. Better quality seed is becoming available, which also should encourage larger plantings.

The crop mix in India is expected to change during 1993/94. Cotton area in the North is expected to decline as oilseeds, especially sunflowers, are becoming more price competitive. Cotton area in the South and West is expected to increase since peanuts are no longer as attractive an option due to lower prices and erratic yields. This area increase likely will more than offset the area drop in northern India.

On the negative side, cotton prices were down significantly during the current harvest due to a good crop this year, large stock levels, and weak demand for cotton from the mills. If mill consumption or cotton exports pick up in the next several months, cotton will be a much more attractive alternative at planting time.

Australia: The persistent drought in Australia has dampened the outlook prospects for the 1993/94 season. Production is forecast to equal or be slightly below this year's estimated 1.6 million bale drought-reduced crop. The drought together with this year's lower world cotton price likely will change the land mix. Irrigated cotton area is forecast to increase due to its continued profitability while dryland area is expected to drop in response to falling returns. With stored water supplies in many areas at very low levels, prospects for the 1993/94 cotton crop depend critically on rainfall by this September. The limited water available for irrigation will be more of a constraint than the low prices.

Turkey: Cotton production for 1993/94 is expected to be down slightly from the 2.8 million bales produced in 1992/93 since high government support prices have pushed domestic prices above the price of cotton on the world market. This situation has discouraged private-sector dealers and forced government cooperatives to buy most of the cotton. Because of the financial limitations of these cooperatives, payments to farmers have been delayed. These

cooperatives still owe some 2,000 billion Turkish Lira to farmers. Despite a 59-percent depreciation of the lira against the dollar in 1992, domestic prices have remained higher than world prices. This situation has made Turkish cotton non-competitive on the world market and has increased the surplus of domestic cotton stocks. These 2 factors do not bode well for higher cotton plantings and output for 1993/94.

Egypt: Cotton area for 1993/94 is expected to increase from the 1.6 million bales produced this year as a result of the sizable increase in producer returns from cotton. For the 1993/94 crop, farmers will be free to sell their crop on the open market. Because of this, the Government is considering a producer floor price for cotton. Moreover, the Government has apparently decided to abandon previous requirements on the area planted to cotton. The system of fines and penalties was weakly enforced and often ignored by Egyptian producers.

Greece: Cotton output in 1993/94 is expected to increase from the 1.1 million bales produced this year. However, the availability of water for irrigation will determine farmers' planting intentions for the spring of 1993. While farmers have turned to cotton because of high EC support prices, available water supplies will be the primary factor that determines area planted.

NOTE: Information in this article is based on field reports from U. S. Agricultural counselors and attaches, together with information from FAS/USDA Washington analysts. Actual production could vary from these estimates for a number of reasons, including government policy changes, weather during the crop season, and price changes for cotton and competing crops. The first official USDA forecast for individual country estimates for area, yield, and production will be released in July of this year.

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TABLE 25

World Cotton Area, Yield, and Production

Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 Bales*)
1983/84	30,883	464	65,847
1984/85	33,614	574	88,648
1985/86	31,442	557	80,383
1986/87	29,236	526	70,567
1987/88	30,778	574	81,179
1988/89	30,231	517	71,771
1989/90	31,482	552	79,866
1990/91	33,072	573	86,980
1991/92	34,749	601	95,965
Estimate 1992/93	32,570	552	82,538
5-Year Avg.	32,421	560	83,424
Forecast 1993/94	32,000	600	87,500

*480—pound bales

May 1993

Production Estimates and Crop Assessment Division, FAS, USDA

RAISIN/SULTANA PRODUCTION IN SELECTED COUNTRIES

The 1992/93 raisin/sultana pack from the world's leading commercial producing countries is forecast at 645,855 tons (packed weight basis), up 1 percent from 1991/92, but 2 percent below the previous 5-year average.

The 1992/93 raisin/sultana pack in the major commercial producing countries of the Southern Hemisphere is forecast at 119,347 tons, 24 percent lower than in 1991/92 and 9 percent below the previous 5-year average.

Australia's 1992/93 raisin/sultana pack is forecast at 70,062 tons, down 27 percent from the near-record outturn in 1991/92. In the major producing areas, adverse weather -- including early frosts, hail, and heavy rains -- coupled with disease outbreaks, are responsible for the reduction in output. Quality has been impacted by a high incidence of downy mildew in nearly all of Australia's grape-growing regions.

Sultanas account for about 95 percent of Australia's production. Other multipurpose grape varieties include Thompson Seedless, Muscat Gordo Blanco, Muscat Hamburg, and Waltham Cross. Multipurpose grapes can be used for drying, bulk-quality wine production, and fresh consumption. Relative prices determine the portion of the crop utilized for each purpose. Demand from the wine industry tends to be the strongest factor determining availability for other uses. The production of multipurpose grapes, as a percentage of total grape production, is expected to decline from an average of 52 percent during the 1988/89-1990/91 period, to 43 percent in 1994/95.

Raisin production in Chile is forecast to increase 10 percent in 1992/93, to 22,000 tons. Despite this rise, the 1992/93 pack is 12 percent below the previous 5-year average.

In Chile, table grapes are not grown specifically for raisin production. Table grapes rejected for fresh market sale are sold for either raisin

production or use by the wine industry. Because Chilean exporters have increased quality standards for table grapes, the availability of grapes for processing has increased. However, strong demand by the wine industry has continued to limit the availability of grapes for raisin production. Wine producers are paying up to 50,000 Chilean pesos (US\$125.00) per ton for table grapes versus the 30,000 (US\$75.00) pesos being paid by the raisin industry.

Nearly 60 percent of Chile's raisins are produced from Thompson Seedless grapes and 25 percent from Flame Seedless grapes. The varietal breakout of the remaining 15 percent is varied and consists of some local species. Currently, around 75 percent of Chile's total raisin production are sun dried. However, in recent years, several large producers and exporters have purchased U.S. technology for drying tunnels and cleaning, classifying, and packaging equipment. There are now over 30 dehydration/desiccation plants in the country with installed production capacity of over 126,000 tons, almost 5 times Chile's current production level.

South Africa's raisin/sultana pack is forecast at 27,285 tons, down 32 percent from 1991/92. Although growing conditions during the 1992/93 season were similar to those in 1991/92, this year the vines are on an off-year cycle following 1991/92's record-setting output of 40,053 tons. The quality of both the 1991/92 and 1992/93 packs was high due to dry weather during the drying season. Prospects for the 1993/94 crop are unclear as there is a strong possibility of restrictions on irrigation water along the Orange River.

Thompson Seedless grapes account for 50 percent of South Africa's 1992/93 production, Unbleached Sultanas for 29 percent, and Golden Sultanas for 19 percent.

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TABLE 26

RAISIN/SULTANA PRODUCTION
(Metric tons - Packed Weight Basis)

	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u> <u>1/</u>
<u>NORTHERN HEMISPHERE</u>				
Greece	83,580	37,000	38,000	37,000
Mexico	7,000	12,500	9,000	13,000
Turkey	138,000	144,000	140,000	150,000
United States	366,666	335,115	297,393	326,508
Total	595,246	528,615	484,393	526,508
<u>SOUTHERN HEMISPHERE</u>				
Australia	59,154	85,478	96,396	70,062
Chile	30,500	33,400	20,000	22,000
South Africa	34,104	30,634	40,053	27,285
Total	123,758	149,512	156,449	119,347
TOTAL	719,004	678,127	640,842	645,855

1/ Preliminary.

DRIED PRUNE PRODUCTION IN SELECTED COUNTRIES

The dried prune pack by the world's leading commercial producing countries is forecast at 239,922 tons (packed weight basis) in 1992/93, up 7 percent from 1991/92 and 5 percent above the previous 5-year average.

The 1992/93 dried prune pack in the major commercial producing countries of the Southern Hemisphere is forecast at 19,700 tons, 10 percent higher than the 1991/92 level and 15 percent above the previous 5-year average.

Australia's 1992/93 dried prune pack is forecast at 3,300 tons, up 31 percent from 1991/92's off-year pack of 2,526 tons, primarily because the weather has been very favorable throughout the 1992/93 growing season.

Chile is expected to realize a record dried prune pack in 1992/93 of 13,900 tons, 7 percent greater than the 1991/92 pack and slightly above the previous record set in 1989/90. Excellent

growing conditions were responsible for the high quality and large size of the 1992/93 pack.

Due to favorable economic returns, total plum planted area, which had remained relatively unchanged for many years, increased 8 percent over the past 2 years and is expected to reach 2,745 hectares in 1992/93. Approximately 90 percent of Chile's area is planted to D'Angen plums, 7 percent to the President variety, and 2 percent to the Imperial variety.

South Africa's 1992/93 dried prune pack is forecast at 2,500 tons, up 6 percent over 1991/92, mainly due to consistently high producer prices.

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DRIED PRUNE PRODUCTION (Metric tons - Packed Weight Basis)

	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93 1/</u>
<u>NORTHERN HEMISPHERE</u>				
France	19,949	36,745	27,800	44,000
United States	215,277	140,025	178,128	176,222
Total	235,266	176,770	205,928	220,222
<u>SOUTHERN HEMISPHERE</u>				
Australia	2,556	3,730	2,526	3,300
Chile	13,800	10,300	13,030	13,900
South Africa	3,512	2,124	2,361	2,500
Total	19,868	16,154	17,917	19,700
TOTAL	255,094	192,924	223,845	239,922

1/ Preliminary.

PAKISTAN WHEAT OVERVIEW

The agricultural economy of Pakistan is dominated by relatively few crops, primary among them being wheat. Wheat cultivation encompassed roughly 54 percent of the national area devoted to crop production in 1992/93, and has no substantial competitor during its winter growing season.

Total wheat output in 1993/94 is forecast at 15.5 million tons, down marginally from the record 1992/93 harvest of 15.7 million tons. Harvested wheat area in 1993/94 is currently estimated at 8.2 million hectares, up roughly 4 percent from last year. Crop yield, however, is forecast to decline owing to abnormally high temperatures in February.

also was characterized by a period of abnormally high temperatures which struck in January and February. The U.S. agricultural attache in Islamabad reported that this hot episode likely contributed to the overall decline in yield. Current forecasts indicate a 4 percent drop in wheat yield to 1.89 tons per hectare, down from a record 1.99 tons in 1992/93.

Harvested wheat area is reported to have increased by about 4 percent as farmers took advantage of excellent planting moisture. Sowings also rose as growers affected by summer floods tried to recoup some of their losses. The surge in grower interest was borne

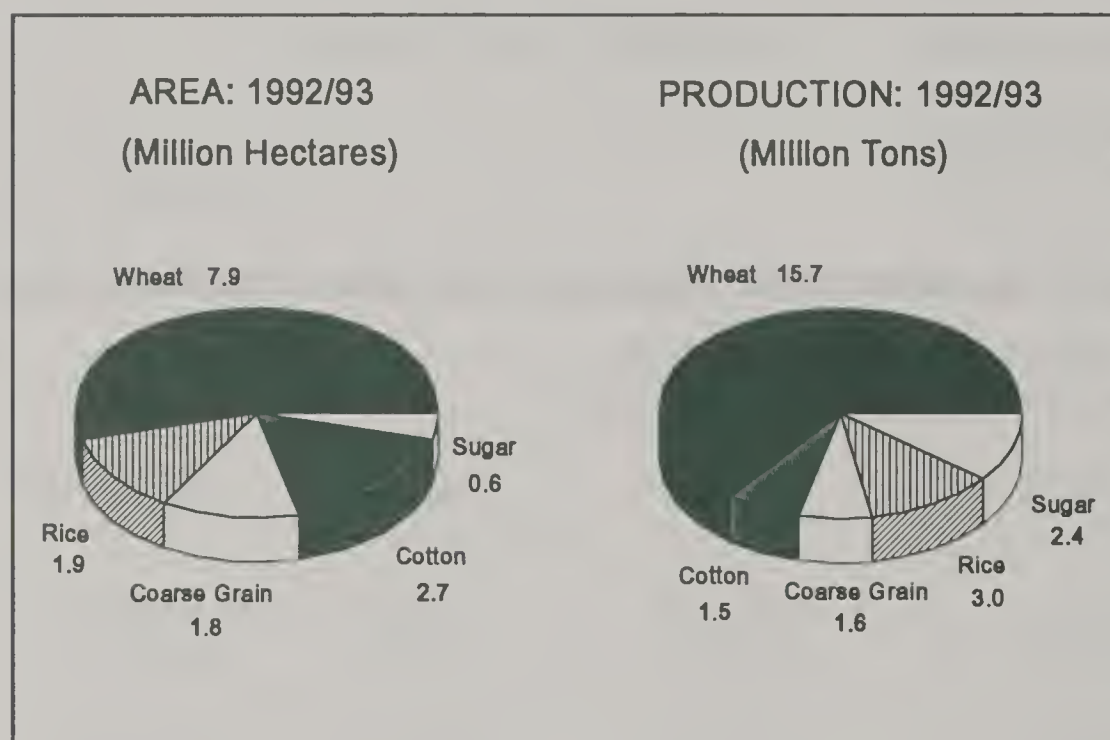
out in recent government figures on wheat seed distributions, showing that sales rose 18 percent over last year. Deliveries of fertilizer also increased substantially, despite a spike in price. The U.S. attache estimated in March, however, that the average cost of production increased 14 percent over 1992/93 from higher costs of seed, other inputs, labor, and land.

The Government delayed announcing the official support price for the 1993/94 crop until March 21st, just before major harvest operations commenced.

The procurement price was increased by 4.8 percent to an equivalent of US\$122 per ton. The delayed price support announcement and the level of procurement price were considered by producers to be disincentives to wheat production.

Wheat Growing Environment

Pakistan's wheat belt covers an extensive portion of the country, relying heavily on the extensive irrigation infrastructure of canals and tubewells along the Indus River. Irrigated wheat area has grown by roughly 53 percent during



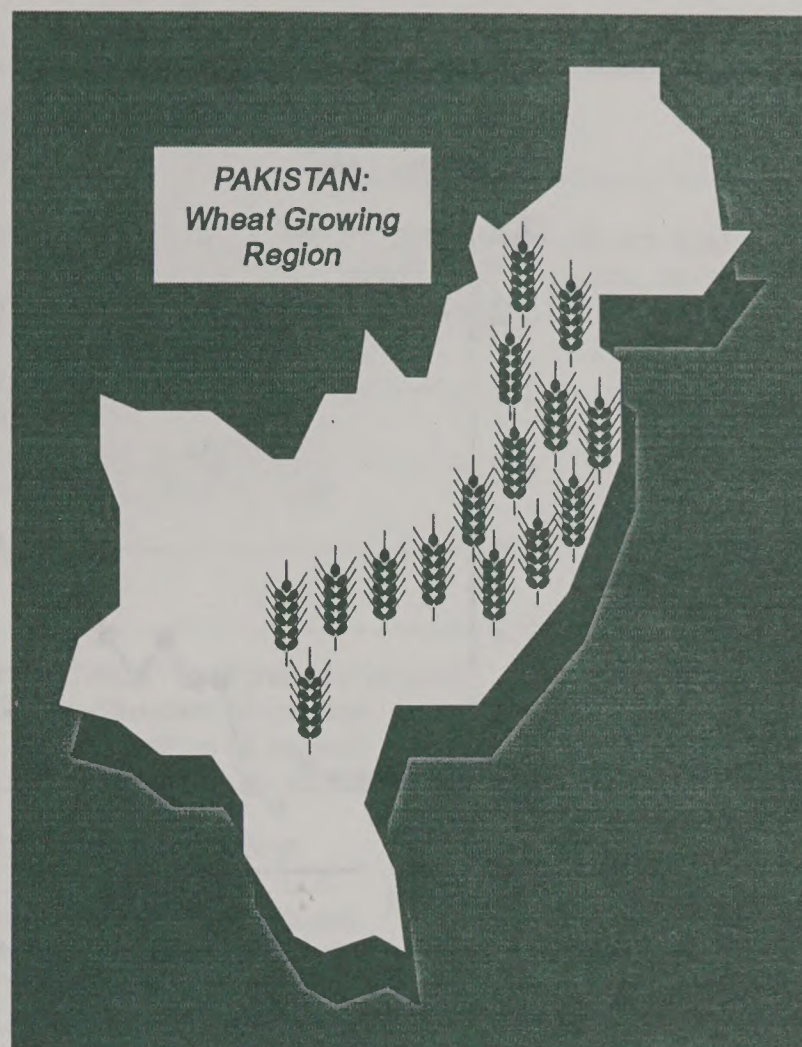
1993/94 Season Overview

The current wheat crop was sown under favorable soil moisture conditions and it received periodic showers throughout the winter growing season. Soil moisture supplies in November were plentiful owing to a serious monsoon flooding event which affected a significant portion of the fertile Indus River valley. High residual soil moisture from waterlogged summer fields, combined with fresh silt deposits, provided a particularly good environment for crop emergence and seedling establishment. The 1993/94 growing season

the past twenty years, rising from 4.5 million hectares in 1970/71 to an estimated 6.9 million in 1993/94. This represents about 82 percent of cultivated wheat area this year. Approximately 73 percent of total wheat plantings occur in Punjab Province; 13 percent in Sindh; 14 percent in the Northwest Frontier Province and Balochistan.

Sowing dates in Pakistan range from November to January, while harvesting normally proceeds from March to May. Wheat is most commonly cultivated in a "double crop" rotation with cotton, rice, or corn. The optimum planting date for wheat is during the last 3 weeks of November. Harvest of the summer crop in these rotations, however, often runs late in the fall. Wheat planting is often delayed until December and January, inherently reducing the crop's yield potential. The cotton/wheat rotation is the most problematical. Pakistani farming systems studies showed that roughly 70 percent of the area sown to wheat in the cotton/wheat growing zone was late, with as much as 41 percent sown after mid-December. Wheat sown as late as January has about half the potential yield of that planted in November. The reduction is typically attributed to the harmful effects of high temperatures during April and May, which can strike late planted crops during sensitive reproduction growth stages. Once a farmer finishes harvesting cotton, an average of 10 days is required to complete field preparation for the switch to wheat. The average turn-around time in the rice/wheat rotation is 3 weeks.

Despite its impact on wheat, crop research in Pakistan has shown that farmers are maximizing the productivity of their total cropping pattern by following this management scheme. Economic analysis indicates that the returns of one additional cotton picking in the fall, for example, is worth twice the value of wheat lost due to delayed planting. Recent efforts to promote pesticide use in the cotton cultivation zone have led to higher cotton yields and the tendency for later harvests. The proportion of total wheat area in the cotton/wheat rotation

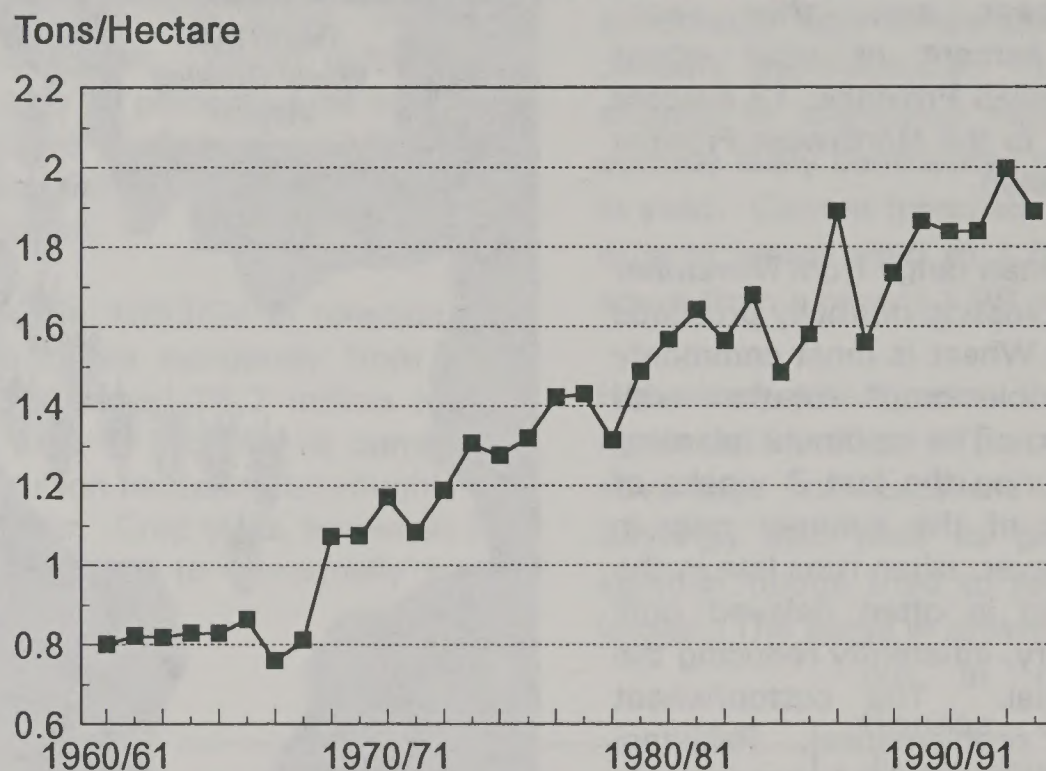


also has been rising rapidly. This has occurred as small-scale irrigation facilities expanded in the cotton zone, and the traditional winter fallow period was abandoned.

Irrigation and Yield

Wheat cultivation, and subsequent crop yield, are critically dependent on the irrigation resources of the Indus Valley. Winter rainfall is both scanty and unreliable. As in India, a significant expansion of the country's "colonial era" irrigation infrastructure was required to support the use of HYV semi-dwarf cultivars and expand their sown area. During the 1960's and 1970's major improvements in the canal network were made, by branching from the main lines. These "link canals" substantially increased the acreage accessible by surface irrigation. Two large reservoirs in the Himalayan foothills also were constructed to catch monsoon runoff and snowmelt. These reservoirs were linked into the canal system, providing substantial new reserves and storage. Tubewell drilling also surged in the prime growing areas, allowing private farmers significant control over available groundwater resources. Pakistani officials estimate that nearly 80 percent of the nation's total

Historical Wheat Yield



groundwater supply has now been tapped by existing tubewells. Today, there are over 225,000 tubewells in the country and more 68,000 kilometers of canals in the national network.

Semi-dwarf varieties were first introduced in irrigated areas of Pakistan in 1964/65. At that time national wheat yield was recorded at 0.83 tons per hectare. As of 1993/94 the average wheat yield had risen to 1.89 tons per hectare, an increase of 128 percent. This translates into a 4.3-percent annual growth rate over the past 30 years. According to government statistics, rainfed wheat yields averaged 0.46 tons per hectare in 1969/70, while irrigated yields averaged 1.43 tons per hectare. By 1985/86 rainfed and irrigated yields averaged 0.98 tons per hectare and 2.10 tons per hectare respectively. Oddly enough, rainfed yields more than doubled in that period, while irrigated yields rose by less than 50 percent.

Much of this "growth gap" between irrigated and rainfed crops can be explained by the prevalence of late-planting in irrigated rotations. Farmers are admittedly sacrificing yield potential from the higher productivity landbase on a regular basis. Varietal development efforts in dryland areas also played a role, as improved rainfed cultivars became widely available in the

1970's. Sowings of HYV cultivars grew from 15 percent of total rainfed area in 1970/71 to 70 percent in 1986/87. Fertilizer application on rainfed wheat also grew substantially, as HYV's were adopted.

In the future, national average yield in Pakistan is expected to plateau. A combination of factors will contribute to a lower yield growth rate, all of which are in play in the country today. Competition between wheat and cash crops in a rotational management scheme will continue, to the detriment of wheat. Production costs will rise owing to a phased decline in government subsidies. Crop management techniques and farm mechanization are expected to improve only marginally. Irrigation expansion has virtually peaked, while the efficiency of water use is not likely to improve soon. Without an energized Government or private role in wheat development over the coming decade, stagnation of crop yields are expected.

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